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ALPHABETICAL INDEX TO ADVERTISERS

(VOL VIII No 29)

Several of the firms who have advertised in the INTERNATIONAL COTTON BULLETIN have expressed to us their satisfaction with the results obtained from the advertisements

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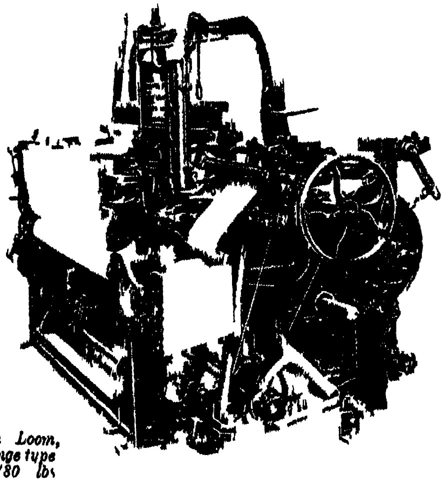

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The International Cotton Committee and the Joint Egyptian Cotton Committee at Barcelona.

INTERNATIONAL COTTON BULLETIN

No. 29. Vol. VIII, 1. November, 1929

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COMMITTEE'S ANNOUNCEMENT.

IT was decided by the "International Committee," at its meeting in Barcelona, that the Official Report of the Thirteenth International Cotton Congress, held at Barcelona, should form the principal section of the present issue of the INTERNATIONAL COTTON BULLETIN.

The first section of the present issue is therefore devoted to this Congress Report.

The papers prepared for the Barcelona Congress will be found in the various chapters, Egyptian Cotton, Cotton Growing, etc.

The attention of the affiliated associations and of individual members is directed to the various resolutions adopted during the proceedings, as set out on pages 47-48. The carrying into effect of resolutions represents the real constructive work of any Congress.

As the Congress was held towards the end of September, and as the speeches of the various delegates had to be submitted for approval, a delay in the publication of this issue has arisen which the Committee trust will be excused.

The "Papers" which have been contributed to the Barcelona Cotton Congress have been inserted in English in their respective chapters in this issue of the INTERNATIONAL COTTON BULLETIN. French and German translations of most "papers" are available on application to the Head Office of the International Cotton Federation, 238, Royal Exchange, Manchester.

OFFICIAL REPORT

OF THE

XIV International Cotton Congress

HELD AT BARCELONA
September 18th to 21st, 1929

IN THE SALON DE LOS CIEN, TOWNHALL

FIRST DAY'S PROCEEDINGS

September 18th, 1929

THE proceedings were opened at 10-30 a m in the historic hall, known as "Salon de los Cien," by His Excellency CONDE DE LOS ANDES, Minister of National Economy for Spain, in the presence of 350 delegates and 150 ladies, most of the latter having responded to the wish of the Committee and had appeared in cotton dresses

Mr SANTIAGO TRIAS, as President of the Congress, addressed the assembly as follows, speaking in Spanish, English, French and German —

The Spanish Federation of Master Cotton Spinners' and Manufacturers' Associations is proud that the International Committee has decided to hold its 14th International Cotton Congress at Barcelona all the more because the organization is celebrating the 25th anniversary of its foundation, during which time it has known to command the highest esteem and appreciation of the cotton industry of the world in consequence of the energetic and practical work which it has carried out with great success

My first duty, therefore, is to express, on behalf of the cotton industry of Spain, to the great Federation which is so worthily represented here to-day our sincerest congratulations for its constant activity and development during these 25 years and to wish that it may continue with growing success its fruitful labours of moral and material collaboration amongst its very numerous members

We Spaniards thank the International Federation cordially for coming to Barcelona to commemorate in Barcelona such an important event, being convinced that this choice was a very excellent one, for we may claim that few cities are more suitable for such an occasion, particularly as our city, through the great World's Exhibition which is just now being held here, expresses in a distinctive form the virtues of the Spanish race

The cotton industry of Spain is part of our own vitality Barcelona has grown in ratio to its cotton industry In the twelfth and thirteenth centuries Barcelona and its province possessed a cotton industry that produced cloth which successfully competed with those imported from India

Gradually our manufacturers introduced new spinning, weaving and printing machines, which caused the cotton industry to develop in all parts of the world, and to day our industry has reached such a state of perfection in many articles that they are able to compete with those of the most advanced countries

For Barcelona particularly the manufacture of cotton has always been the basis of its wealth, for to a great extent it is due to this industry that the Catalan has become hard-working, active and progressive, always desirous to become more perfect

Therefore, we cotton industrialists are proud of our occupation, and this Federation in which the members are united by the same devotion and love towards the industry as our forefathers possessed, qualities which contributed so much in creating the greatness of our country, has responded worthily to the decision to celebrate here the fourteenth International Cotton Congress, and we sincerely hope that during these proceedings new important successes will be achieved and be added to those accomplished during the preceding 25 years

To day, where in all nations exists a great current of political and economic approximation, such as never before, we must maintain a unity in the International Federation in order that our organization may be called upon to establish amongst the affiliated countries such agreements as will avoid the difficulties which afflict at the present time our industry throughout the world I express my gratitude to His Excellency the Minister of National Economics for being present here at our inaugural meeting and for thus giving greater prominence to it, and also to our much esteemed authorities of the local and city government for the assistance they have given us, and I hope that the delegates will carry away with them an indelible impression of this fourteenth International Cotton Congress which we are inaugurating in this meeting

HIS MAJESTY THE KING OF SPAIN has deigned to accept the Honorary Presidency of this Congress May I be permitted to transmit to him the expression of our deep gratitude and of our enthusiastic support and also to the Government and to its President, General PRIMO DE RIVERA, whose efforts to procure for us the peace necessary for the development of our normal work and the progress of our industry we shall never be able to thank sufficiently

The MAYOR OF THE CITY OF BARCELONA and other authorities then welcomed the delegates

Mr I HOLROYD, as President of the International Cotton Federation, responded in the following words —

It is my pleasure and duty, as President of the International Cotton Federation, to present to you, in accordance with the statutes, an account of the stewardship which you have vested in your Executive Committee, but before doing so I desire to express, on behalf of all of you, to His Majesty King Alfonso XIII our sincere gratitude for having graciously accorded to act as

Honorary President of this Congress, and I cordially thank Your Excellencies for the very hearty words of welcome which you have just now addressed to us. We are equally indebted to our colleague on the International Committee, Mr. Santiago Trias, to the Spanish Association of Cotton Spinners and Manufacturers, and to the many who must have contributed in preparing this wonderful programme for our benefit.

ACTIVITIES OF THE INTERNATIONAL COTTON FEDERATION.

Mr. F. **Holroyd** then delivered the following report:—

This beautiful historic hall must inspire every one of us, and make us realize Spain's greatness in those medieval times when other European nations were in their infancy, and when the great United States of America were not yet found by Spain. Your nation probably was the first in Europe to start cotton spinning and weaving, and certainly cotton growing was in existence in the south of Spain during the second or third century of the Christian era.

In addressing myself to the ladies and delegates from the other countries allow me to express to you the great satisfaction at your presence here in such large numbers at our silver jubilee. You all will agree that this large attendance is a sure proof and an acknowledgment of the constructive work which we are carrying out for the common interest of the world's cotton industry. There are affiliated with us 21 countries, most of which are represented here, and our headquarters are in touch with every cotton mill throughout the world; consequently we are a truly international organization.

It is because we have always aimed, and I think I may say that we have succeeded to some considerable extent, in approaching in a practical way the solution of some of the more important problems that affect the economies of each individual member, that we receive the attention and respect of every institution and Government which is interested in cotton either from a growing, manufacturing or commercial point of view. In whichever part of the world you may be, the activities of our organization are regarded with deep appreciation. This fact is, indeed, a great satisfaction to my Committee, and undoubtedly to you all.

One of our first duties at this commemorative event should be to remember with reverence those who have occupied important positions on our International Committee, and also those who have taken part at our gatherings and have, during these last 25 years, passed into the Great Beyond. May I ask you to rise and acknowledge in this way our appreciation for services they have rendered to us, and our sympathy to their relatives who still remain with us.

The occasion of a silver jubilee justifies me to claim your indulgence for reviewing succinctly what we may now call the historical development of our international organization, of which we are all proud to be members.

The inception of the formation of the International Cotton Federation was given in 1904, in consequence of the high price of cotton, which had been artificially raised by the Sully ring. Every nation felt the effect, and England in particular. With the co-operation of Belgium, France and Switzerland, the first Congress organized in Zurich. It was realized on this occasion that the foremost of our mutual interests was that of the supply of cotton.

The development which has taken place since then in the growing of cotton in the Colonies and Dependencies of the European nations may not have quite responded to the sanguine forecasts of the early promoters, but a glance at the cotton consumption tables of the International Cotton Federation shows a steady increase by the European mills; they are now using annually over 2 million bales of what we term sundry cottons, and we may justly claim a share in this very commendable work by co-ordinating the results achieved in each country, by disseminating the reports of the activities, and by directing the attention of the Governments concerned to the importance of extending and improving the cotton-growing industry.—We have also interested the countries in South America in the growing of cotton by sending to Brazil and Colombia small missions on three occasions. In pre-war days the International Cotton Federation bestowed considerable attention to the extension of cotton growing in India, and no doubt some of its early work is being reflected in the larger crops which now enter into the world's supply from that portion of the globe.

Our cotton-growing propaganda has not been without effect even on the cotton grower in U.S.A., where it is now being realized that there are other parts of the world which can produce cotton of equal and, in some cases, better quality at more reasonable prices, and this is no doubt prompting the American grower to introduce mass-production methods with a view to reducing the cost. Gentlemen, I hesitate to think what the price of American cotton would be to-day if we had not the increased supplies from those other parts of the world of which I have been speaking. Every cotton industrialist in the world, even those of U.S.A., have benefited very extensively by this work of promoting cotton growing, for, no matter where the cotton is grown, the additional supplies have assisted to make us less dependent on the vagaries of the weather of U.S.A. and of the excessive speculation which is so prevalent in that country.

Therefore, though the subject of cotton growing on our agenda may appear to be somewhat stale to some of us, yet do not forget that it is of very great importance and value to all of us.

Our world's statistics of cotton consumption and mill stocks, originated some twenty-three years ago on the initiative of Mr. Arthur Kuffler, have proved of a real practical value, and are recognized the world over as thoroughly reliable. Whilst formerly trade and industry were guided by rough guesses of those whose interests are frequently contrary to those of the cotton consumers, we have now a compilation of actual facts through which enormous amounts are being saved to the industry.

The "International Cotton Bulletin" is continuing to enjoy the greatest popularity. It is a means of informing the rank and file of the work carried on by the Committee, and of keeping the members posted up as regards the happenings in the cotton world. It was Count Jean de Hemptinne who, at the Stockholm meeting, suggested the publication of this *International Cotton Bulletin*, and I think he will agree that he did not at that time anticipate that it would be such a success as it has proved to be.

We have issued during the last few years three elaborate Reports, in handsome book form—6,000 copies of each— viz., the Egyptian Congress Report, the Visit of our Mission to Colombia, and just recently the Report on the Japanese and Chinese Cotton Mill Industry. All these books have been of an enormous educational influence, and I venture to say that no cotton book has ever had as large and as favourable a press notice in England and abroad as our recently published Japan and China Book.

The account on the Mass-production System of the U.S.A. Mills, published last year in the *International Cotton Bulletin*, has made a deep impression on all the European cotton mills. There is not one of us who has not profited materially by the study of this publication of the International Cotton Federation. This report has been translated into very many languages, which testifies to the great value which the various countries placed on it.

Our Congresses have been always highly successful, particularly the one held 2½ years ago in Egypt. Many practical results have emanated from it. The Egyptian Government has taken the advice of the spinners to heart; they have enlarged their cotton staff by searching for the very highest authorities in the world as their experts, they have been singularly successful in developing new strains in Upper Egypt with very high yields and correspondingly lower cost. Through the Joint Egyptian Cotton Committee, over which my friend Mr. Wm. Howarth has ably presided, and which is a direct outcome of the Egyptian Congress, we are making great advances in that vexed question of humidity in Egyptian cotton, and we are looking forward to the proceedings of this Congress for a fixation of the standard of humidity. I gladly acknowledge the very hearty co-operation which the Egyptian Government has given to us, and I welcome particularly the presence of His Excellency Ahmed Abdel Wahab Bey, Under-Secretary of State of Finance, and of all the other gentlemen from Egypt who have come to this Congress.—I realize only too well the progress which has been made by the Egyptian section, and I look forward to the days when it will be possible to establish similar sub-committees for American and East Indian Cottons.

We have supplied to members Reports on the state of the American Crop during the growing season. We have merely forwarded a summary of the impressions of well-known people whom our representative consulted on his tour through the Belt. It would never do for our staff to send their own views, as, in an organization of the magnitude of ours, there must always be some members who are bulls and others who are bears. Our reports are an honest effort to convey the real market sentiment, and the reason why they are perhaps more appreciated on the Continent than in England is that we find it still to our advantage to buy most of our cotton in the open markets of Liverpool and

Manchester, whilst many of the Continental spinners prefer to buy in the U.S.A.

The whole work of the International Cotton Federation, I assure you, is being carried on in a most efficient way on very economic lines by means of a small but capable staff, which is very frequently working overtime. I venture to say that there is no other similar organization performing such a great amount of work with as small a staff. I am certain no other organization has a more efficient secretary than we have in Mr. Arno Pearse.

Unfortunately, the State of Trade has been most disastrous in England for the last eight years. You, on the Continent, have only recently felt this repercussion of our excessively bad trade. You are bound to be affected by our bad trade, as we in England are dependent for 75 to 85 per cent. of our trade on exports. Our machinery as a whole is as good as any in the world, and our operatives are good workers; but we feel at a great disadvantage that we cannot work longer than 48 hours, due to trade union restrictions, whilst in every other country of the world overtime and double shifts may be worked. You are able to "sweat" your machinery, and can thus reduce the cost of production, whilst we, with probably the highest wages, highest taxation and social legislative burdens in Europe, are tied down to no more than 48 hours. England is suffering very acutely, but we are at last beginning to see the silver linings of the heavy cloud that has hung over Lancashire. Reforms of very far-reaching importance have been and are being inaugurated, and we are confident that they will help us to regain a great deal of the ground which we lost during the war. Lancashire is still the centre of a devastated war zone, the result of an economic war of great severity, but we have the courage and, I believe, the stamina to win through, and when Lancashire is again doing a normal business you abroad will likewise benefit, as no industry is more interdependent than ours.

In conclusion, I wish to appeal to you to give your best attention to our business proceedings. The agenda contains very interesting items, and whilst at times the weavers have complained that they have not had sufficient subjects for discussion, I think they will be satisfied this time, for we have the question of automatic looms and new uses of cotton textiles on our programme. The latter subject has been most ably dealt with in a special paper by the President of the Cotton Textile Institute of New York, Mr. Walker D. Hines, whose corporation has been engaged on this topic for many years. We feel that much may be achieved by combined action throughout the world.—The novel feature of a mannequin parade for showing what beautiful cotton dresses can be produced, which will be held this afternoon, is sure to attract great attention, and in this connection I wish to thank my friend Col. N. Seddon Brown for having kindly provided, through that world-renowned firm of Horrocks Crewdson & Co., the very elaborate and artistic dresses. I also wish to thank all the ladies who have appeared here to-day in cotton dresses, in accordance with a wish expressed by us. I am sure few will have thought it possible that such beautiful creations could be made out of cotton.

May I appeal to all of you to mix freely amongst each other during our social functions. The free exchange of experiences and opinions amongst so many nationalities, of men who have the same mutual interests at heart, is invaluable in broadening one's mind, in removing national jealousies, and in promoting peace and goodwill.

This synopsis constitutes the main features of the work of the International Cotton Federation. No mention has been made of other subjects, such as Courts of Arbitration, Mill Fire Insurance, Bills of Lading, etc., with which we have dealt in the past. Our International Cotton Federation is an International Parliament of the cotton industry, and it is as well to realize that through its instrumentality great progress and actual savings have been brought about. Those of us who form the Committee cannot help but visualize the immense possibilities that are awaiting further international action if the development of this world-embracing industry is to proceed satisfactorily in face of the many difficulties which are threatening its economic working in most countries.

It is hopeless for the individual, the firm or the National Association to deal single-handed with the vast issues which affect the destinies of the millions who are directly and indirectly engaged in our industry. We are living in the era of combination, not only nationally, but internationally, and with a view to extending still further the usefulness of the International Cotton Federation the Committee will submit to you on the last day of the Congress additions to our statutes. By establishing an Associate Membership we trust to find the means of drawing into closer co-operation cotton exchanges and other allied industrial and commercial associations.

The CONDE DE LOS ANDES welcomed the delegates in the name of H.M. the King, and said: "Your Chairman, Mr. F. Holroyd, has just delivered a most important speech on the cotton industry of the world, from which it is clear that there exists a fraternity with the resultant unity of action and aspirations of which you ought to be proud. I congratulate your industry on its co-operative work. Practically all industries are passing through a severe crisis, as a result of the forced development of various industries during the war, and that addition has made it impossible to solve as rapidly as was desired the problems which post-war conditions created, and it is only through co-operation such as you pursue that remedies will be found."

At this point the ceremonial opening session came to an end, the invited guests withdrew, and the business session began.

Mr. F. Holroyd, as President of the International Cotton Federation, occupied the chair.

The CHAIRMAN: This morning's session is devoted to the subject of

COTTON GROWING.

In the first place we are to have an address by Mr. Alfredo Sedó, on "Cotton Growing in Spain."

Mr. ALFREDO SEDÓ (Spain) read the paper printed in the chapter "Cotton Growing in New Countries."

Mr. BUSIAN (Spain) gave a résumé of the work carried out by the Spanish Government Cotton Commission. An extract of this rather voluminous report will appear in the next issue.

Mr. WILLIAM HOWARTH (England) then gave a synopsis of his paper, "Review of the Work Regarding Cotton Growing Within the British Empire," and added: I think perhaps it would be as well to tell you, in conclusion, because I expect you have read the paper in a quiet way, that during the time the British Cotton Growing Association has been operating 3,156,215 bales have come directly to the British Cotton Growing Association as the result of its work, and the value of that cotton has been £82,554,450—that was to the end of the last season. So you can see the great amount of work that has been done and the practical results which have accrued from the work of the British Cotton Growing Association and the British Empire Cotton Growing Corporation.

Mr. R. SEYRIG (France) mentioned the salient parts of the paper dealing with "Cotton Growing in the French Colonies." (*See Cotton Growing chapter.*)

Dr. G. MYLIUS (Italy) gave a synopsis of the Italian paper (*see Cotton Growing chapter.*)

LE COMTE JEAN DE HEMPTINNE (Belgium) gave a synopsis of the Belgian paper. (*See Cotton Growing chapter.*)

Mr. ARNO S. PEARSE, the General Secretary: According to our statutes, all resolutions will be voted upon on the last day of the Congress. The International Committee has already prepared a resolution on cotton growing, and I have been requested to read it to you so that you will be prepared for Saturday morning's meeting. The resolution reads as follows:—

> "This Congress, representing the cotton users of 21 countries, desires to record its unanimous appreciation of the efforts which are being made in many countries with a view to increasing the supply and improving the quality of cotton.
>
> This Congress records with satisfaction that Europe is consuming annually over two million bales of cotton grown in countries outside the old-established sources of supply, and calls upon the Governments of all countries where cotton growing can be carried out on a commercial scale to give every assistance in their power for extending cotton cultivation, especially by facilitating the provision of means of transport and irrigation where necessary."

The CHAIRMAN: I think you will understand the reason why these resolutions will not be voted upon to-day. It is because none of us can thoroughly grasp, the first time we hear it, a resolution proposed, particularly if it is in another language than our own, and in order that we may get time to understand thoroughly these resolutions we refrain from voting at any of these sessions at which they have been first introduced. The whole of the voting will be done at the last meeting of the Congress.

COMMON INTERESTS OF GROWERS AND SPINNERS.

The next paper is on "Common Interests of Growers and Spinners in the Cotton Industry." This paper was to be read by Mr. C. O. Moser, President of the American Cotton Growers' Exchange. Unfortunately, he cannot be here with us, but Mr. Robertson, the European representative, is here, and will take his place.

Mr. HENRY ROBERTSON (U.S.A.): Mr. C. O. Moser, President-General Manager of the American Cotton Growers' Exchange, Dallas, Texas, was to speak to you on "Common interests of Growers and Spinners in Cotton Industry," but is unavoidably detained in America because of pressing business; therefore he has asked me to read extracts of his speech. The original speech has been sent to you by the Secretary. (*This will be found in the American Cotton chapter.*)

1. The motive and purpose of the Cotton Co-operatives is to give maximum service to the industry by performing every marketing function with greatest economy, efficiency and satisfaction to all concerned, besides shortening the route between producer and spinner.

2. The Cotton Co-operatives have been doing business for seven years and to-day their standing is the highest and their credit is unquestioned, and we number among our customers over 200 American cotton spinners who are buying most of their supplies from the various Cotton Co-operatives, and this number we hope to increase the coming year. In Europe, our business is confined mostly to merchants, but in some cases we are selling direct to spinners and our business relations with these spinners have been entirely satisfactory from every standpoint.

3. It may be of interest to you gentlemen to know that the Cotton Co-operatives are endeavouring to get the member farmers to plant the very best seed to be obtained, so that in various communities where these special seeds are planted every effort is being made to produce a superior quality of staple; but at the same time they are erecting cotton gins, and up to the present time the Cotton Co-operatives own and operate 50 gins, and this number will be increased yearly, and through this method of seed selection and proper ginning we hope to produce cotton of quality, so that mills purchasing their supplies from us will get first-class cotton.

4. It is well known to the cotton trade that the system of cotton buying discourages quality production because the cotton buyers in the various towns of America pay one price as a rule for all staples; therefore, the farmer has no inducement to plant a better quality; but through the Cotton Co-operatives we are trying to induce them to produce a better quality, and in this way they will get a better price.

5. The Cotton Co-operatives' slogan, when they were organized, was: "From the Farm to the Mill," and our progress, while slow, is sure, and it is our intention at a future date to establish in Europe an organization with sufficient capital to do business with spinners on spinners' terms, just as the other merchants do.

6. In Europe, as I have stated before, our business is principally with merchants, and during the past seven years we have sold, through our various European agencies, about one million bales of cotton, and we say with pride that only 3 per cent. were sent to arbitration, and the allowances were very small, and this was in the beginning of our organization when, naturally, our classing was not as perfect as it is to-day, and we point with pride to this record, which should interest spinners.

7. Co-operative merchandising of cotton is an established institution in America, and it will continue to grow because the policies of the Cotton Co-operatives are most progressive, and mutually advantageous to the grower and spinner alike. As is known, the Cotton Co-operatives have the moral support of the American Government, and no one can question that with this support the Cotton Co-operatives are going to meet the most rigid test of efficiency according to any recognized standard based on merit and service.

8. Certainly the time has arrived when spinners should show more interest in our cotton, and we suggest that they purchase through our agents in the various centres who are selling direct to spinners a part of their requirements, and in this way they would learn the value of our cotton. Besides, we would suggest in certain sections to establish group-buying offices, for the purchase of their needs rather than through the present system of buying through interior agents located in mill centres, which is costly.

9. Under the new Federal Farm Board Act, the operation of the Cotton Co-operatives, as in the past, will be continued in future. Much has been written regarding the attitude of the American Government on what is publicly known as the Farm Relief Bill. It should be kept in mind that this Act, passed by the U.S.A. Congress and approved by President Hoover, does not interfere with the operating policies of the Cotton Co-operatives, but, on the contrary, it gives the Government's co-operation and financial support. Otherwise stated, this legislation forms what might be termed a partnership with the farmers through their own Co-operative Associations in carrying out the following declared purposes:—

(1) To minimize speculation.

(2) To prevent inefficient and wasteful methods of distribution.

(3) To encourage the organization of producers into effective Co-operative Associations under their own control for greater unity of effort in marketing and promoting the financing of producer-owned and producer-controlled Co-operative Associations and other agencies that they may establish.

(4) To aid in preventing and controlling surpluses in any agricultural commodity through orderly production, so as to maintain advantageous domestic markets and prevent such surpluses from causing depression.

10. A fund of five hundred million dollars is provided for the purposes of price stabilization, due to seasonal surpluses beyond the control of producers, and for financing the acquisition of

physical facilities, etc It has long been the view of the American farmers and business men that the strong arm of the Government should be used to prevent bountiful productions from bringing bankruptcy and distress, not only to the farmers of the U S A but also to those who provide credit to them The new law provides various means for encouraging farmers to become members of the Co-operative Associations, and it is the hope and view of the heads of these organizations that from year to year the Cotton Co-operative Associations will control more cotton and in this way they will bring about a stabilization of prices, which should be welcomed by all manufacturers

11 In normal times, it further provides insurance against a decline in price for the members of the Co-operative Associations through the establishment of Stabilization Corporations to take care of overproduction, but no attempt will be made artificially to raise the prices under normal conditions There is nothing to be feared from the operations of the Federal Farm Board It should be helpful to the trade, who desire stable prices, as it is to the farmer Both the Board and the Co-operative Associations are fully aware of the danger of price control, and neither favours prices too high as to unduly encourage cotton production in other countries, or the overproduction in this country As cotton acreage follows price, we believe a stable price will tend to bring about more fluctuations on the cotton market The purpose is simply to flatten out the price curves, and to do so with benefit alike to all legitimate phases of cotton industry

12 With the American Government as the partner with the American Cotton Co-operatives in financing and other phases of operating policies, we believe that the Cotton Co-operatives will be in a better position to render a larger and finer service than they have been able to do heretofore, when they were compelled to depend upon their own resourcefulness and resources in conducting their business

The **CHAIRMAN** The question is open for discussion If anybody would like to ask questions of Mr Robertson, I think he would be only too pleased to answer Does any gentleman want to make any remarks on the paper which has been read?

Mr C H **BROWN** (Egypt) I would like Mr Robertson to give us a few more details of the work of the Farmers' Board There is a particular point, of price--as to whether they have fixed a limit, or whether it is left open

Mr **ROBERTSON** The answer to the gentleman's question is that at the present time the Chairman of the Farm Board has announced that the present prices of cotton are sufficient There will be no effort to push it up in any way, shape or form The question of price is governed entirely by production and needs of manufacturers, of which they are aware in their Statistical Department, but it is their policy not to push prices up, to make uniform prices wherever it is possible for all They have no intention whatever of pushing up the market because the manufacturers get behind that

Mr C H **BROWN** Is the price fixed now?

Mr H **ROBERTSON** There is no price fixed now

Mr C H Brown You have not decided what the price will be for the future?

Mr H Robertson There is no decision on that line at all That is a matter to be decided

HOURS OF LABOUR IN COTTON MILLS

Mr J I Higson (England) May I ask the following question? Can we have any information with regard to the resolution brought before the Committee at Brussels by Mr Howarth respecting hours of labour and the running of double shifts?

Mr Wm Howarth (England) This matter was brought up at the International Committee Meeting yesterday, and I was requested to give an answer to such a question if it happened to be put The position is this With the exception of Austria, the Continent is unitedly opposed to the resolution which I had the privilege, on behalf of the English spinners, to propose at Brussels, viz, that this subject should be discussed here

Of course we in England are firmly convinced that it is our duty, as leaders of the trade, to help the operative to the best of our ability to reduce the hours of labour and to give them the best conditions that the nature of the trade will afford them at any given time, and we thought that we were bringing forward to the Committee something which would meet with a ready reception However, I have indicated to you that we are limited now in our progress for some considerable time As long as the Continent will not agree that hours of labour shall be stabilized at 48, and that no double shifts shall be worked and overtime shall be abolished, it does limit what we are capable of doing in England I can put it in this way, that the English representatives on the Committee will not cease in their efforts to try to convert their colleagues on the Continent to the view that we, in England, have at the present time

Mr A Kuffler (Austria) The Committee did not think fit to take that matter up at present for the reason that Mr Howarth has explained, but I consider it right to express my own views, and I think they are the views, perhaps not of the associations but of a great many spinners on the Continent It is very peculiar that since the end of the war the cycle of trade is very much quicker, the ups and downs are very much quicker, the ups are higher and the downs are deeper Before the war we had times of depression and we had times of good trade, but those periods lasted for a certain number of years, new mills were built, and by and by the production outran the demand Now, if you go back for the last six or eight years—I speak for the Continent—if there has been good trade, if there has been a good demand, as for instance in 1925 and 1927, it lasted only a very few months, it may be only half a year What is the reason for that? They do not put up new mills now in five or six months In fact, I believe in Europe not very many mills on a large scale have been put up in these last five or six years I believe that the only reason for the depression, and of this permanent depression, is the 48-hour week Perhaps you will not understand me at first, but I will try to explain On the Continent, before the war, we worked 60 hours, and in some cases 66 hours in some countries. Now, according to the Washington agreement, which has become international, female labour and youth labour cannot be employed between 10 o'clock at night and five o'clock in the morning, that is to say, if you work 10 hours a day or 11 hours a day you are at the top of your production. The demand may be big, but you cannot produce more because a double shift is prohibited, except if you use exclusively male labour, and that is possible only in very rare cases. But since the 48-hour week has been established in most countries the double shift can be introduced, and is introduced everywhere where there is a surplus of labour, and in a great many countries there is. Within a few weeks it is feasible to introduce a double shift. In normal times, when the demand grew and one mill after another had sold out, the price went up and business became profitable, but now the result of a good demand is, of course, an increase of production. Nobody tries to get a better price, but as many as can introduce a double shift, thus reducing the overhead and getting a profit out of the business. That procedure is not limited to one or two mills, it is open to everybody. As soon as demand shows an increase you increase the number of spindles by adding, say, 50 per cent through the introduction of double shifts. I believe that these double shifts and this overtime are the root of all the depression of the cotton trade, and if we could do away with them, if we could have a fixed basis of production, everything else would adjust itself.

Another great drawback is that you have now no idea as to how much it is being produced in any country. All our statistics are worthless. They are true for the day on which they were written, but on the next day 10, 15 or 100 spinners may decide to go on double shift, and the production is doubled. What is the good of your statistics and what is the outcome of it? The outcome is that in a very short time production outruns consumption. Everybody tries—and I speak from my own experience—to keep up the double shift a little longer than the demand. If we could or would stop the double shift on the same day as the demand decreases it would be all right, but you hope for better times next week or next month, and the double shift runs longer than the increased demand, and then comes the depression, that depression which is inevitable and comes regularly now, and cannot be done away with, because it means doubling the production, doubling the quantity of yarn offered. That works in two ways. You have to compete for the cotton because you use more cotton, and drive the price of cotton up, and you have to compete for the sale of yarn and cloth and drive the price down. If you look at the general figures you must agree that the production of cotton and the consumption of cotton are about level. The consumption has increased during the last few years. It is not true that it has decreased. Five years ago, say, a crop of 12 or 13 million bales in America was sufficient. Now we want a crop of, say, 15 million bales, and this crop of 15 million bales is consumed. The reason is that there is too much machinery between the raw cotton and the consumption. It is not true that consumption has decreased. The individual consumer takes either the same or a little more from year to year, but what we do is to push increased use of machinery between the stable or slowly rising production of cotton and a stable or slowly rising consumption of the finished article As long as we do that any stabilization in the cotton industry is impossible Even if, as Mr Robertson told us, the price of cotton was stable, what interests us as spinners and manufacturers is not the price of cotton, it is not the price of the finished article, but it is the difference between those two prices which is the most important thing for us The only important thing for us cannot and will not be stabilized as long as it is left to the individual decision to double production from one week to the other Therefore, I must say again, and I speak now only as a private individual, I am absolutely convinced that until this question is tackled and properly solved there cannot be any progress and there cannot be any profit in the cotton industry

Before the war, when we had these Congresses, we always prided ourselves that we did better work than the diplomats and statesmen They have gone ahead of us, they have done better than we have They seem now to be able to solve questions which are, to my mind, difficult We do not seem to have the courage of tackling this difficult problem, but, nevertheless, I think until we do, and until we get either a common action or common legislation we cannot have any stabilization in this trade, and we cannot hope for any profit

Mr R SEYRIG (France) I consider that as the Committee has arrived at the decision that it is not desirable for the present to discuss this rather delicate question, after due consideration of various reasons, we are now at a point where this discussion on this subject ought to cease

The CHAIRMAN Is that the wish of the Congress?

The CHAIRMAN If there are no further comments on this question, we will take up some suggestions which have been made in our Committee regarding

EAST INDIAN COTTON

Mr EMIL WAIBEL (Germany) As Germany is a large user of East Indian cotton and as several of our spinners have had occasion to complain about false packing, adding of seed, either whole or bits, I have pleasure in proposing on behalf of the German cotton industry the following resolution —

> " This International Cotton Congress endorses the many advantages which would result from the general application of the Cotton Ginning and Pressing Factories Act, but it regrets that so far this Act has not been sufficiently enforced, and it respectfully asks the Secretary of State for India to use every means in his power that this legislation will be effectively carried out in future throughout India
>
> This Congress laments the falling-off in quality of Punjab-American cotton generally through admixture with other kinds, and it expresses the hope that steps will be taken to keep this and other varieties from being mixed

The fact that the Punjab-American Cotton raised on the British Cotton Growing Association's farm in India has improved shows that there is no need for this general falling-off in quality "

Mr K **SHIMADA** (Japan) In the name of the Japan Cotton Spinners' Association I have much pleasure in seconding the motion which is put forward

Mr **ARNO S PEARSE** This resolution will also be voted upon next Saturday, and all delegates will have copies of the proposed resolutions in the course of a day or two

Sir **THOMAS SMITH** (India) Coming, as I do, from India, perhaps I may be permitted to say a very few words on the subject of this resolution What you are being asked to say in the resolution has already attracted the notice of spinners in India, and as the result of our representations the Indian Central Cotton Committee has taken this question up—the question of the wrong marking of bales and of the serious depreciation in Punjab-American cotton

By a mail received two or three weeks ago I got the following

> 'An important and interesting step was taken by the formation of a Malpractices' Sub-committee of the Central Cotton Committee to consider and deal with the various malpractices which are so adversely affecting the interests of the cotton growers of the country This sub-committee has been given full powers to co-opt representatives of all cotton interests, growing, trading and manufacturing, in order to assist in its deliberations and in the solution of the various difficult problems which it will be required to investigate The Central Cotton Committee have charged this new sub-committee with the early investigation of the serious problem of the mixing of American and *desi* cotton in the Punjab, which has resulted in the almost complete depreciation of the important Punjab-American cotton crop "

From that you will understand, gentlemen, that steps have already been taken in India, but it will be a good thing if this resolution goes forward from the International Congress, because it will then show that not only are we, in India, complaining about the depreciation, but you, our buyers, are adding conviction to that objection

Mr H S **BUTTERWORTH** (England) The Congress will appreciate that this resolution arises from what we term in England the inner circle" As one of the members of the outer circle, the various segments of which meet only under such pleasant auspices as we find ourselves this morning, I want to thank the Committee for this resolution The most significant sentence in the President's resume of the International Federation's activities this morning was, in my opinion, that in which he said 'I hesitate to think what the price of American cotton would be to-day if we had not the increased supplies from other parts of the world "

After reading this resolution which has now been presented to us, I asked myself Should the resolution be extended to include marketing? And I have come to the conclusion that it should, for the following reasons. The paper from America on the "Common Interests of Growers and Spinners" emphasizes the importance of price to the grower. This feature is not less important to the growers of India. I venture to say that the superior qualities of Indian cotton do not receive adequate acknowledgment in the matter of price. This, in my opinion, arises out of the restricted market which operates in these staples. If, therefore, we could adopt means which would extend the market we should take the most practical steps towards increasing the supplies of satisfactory cotton from India.

I therefore give notice of motion that this resolution be extended so as to request the Indian Central Cotton Committee, or whichever is the appropriate body, to undertake some method of more efficiently presenting these superior growths to world markets.

Both mover and seconder agreed with the advisability of including the reference of improved marketing facilities in the resolution, and the Chairman intimated that when the resolution comes to be voted upon this addition would be made.

This terminated the proceedings of the first day.

SECOND DAY'S PROCEEDINGS

September 19th, 1929

MR. WILLIAM HOWARTH, J.P., IN THE CHAIR

The CHAIRMAN: Ladies and gentlemen, for myself, I want to say how delighted I am to be in Barcelona once again. As a delegate to the last Congress I may say that I properly enjoyed myself on that occasion. I can see that very great changes, all for betterment, have taken place in this city since our last visit, and I am quite sure that I am voicing your views as well as my own, in expressing our appreciation and our gratitude to the Spanish people for exhibiting to us the progressive measures of this great city.

Now, to day, to begin with, we are to deal with certain aspects of Egyptian cotton. I have to say that probably no Government in the world takes so great an interest in the cotton produced within its boundaries as does the Egyptian Government, and I think it is due to the Egyptian Government that every spinner in any country where Egyptian cotton is used, should express his appreciation for this work.

I am glad to say that, as the result of our visit in 1927 to Egypt, the Government obviously took careful note of what the spinners said, and under the direction of the agricultural authorities and experts, like Dr. Balls, many improvements have been effected in order to meet the spinners' needs.

Of course, we know that labour costs in Egypt are lower than they are in the United States and in many other countries, and that the frugality and the hard work of the *fellaheen* of Egypt is not, from the standpoint of money, so fully remunerated. There are, however, other aspects which it is not proper for us to enter into, but it is for the Egyptian growers themselves to remedy this matter. We do say this as users of cotton, or intermediary agents for the selling of that cotton, that it may be well for us jointly to consider how far the purchasing power of those 13, 14 or 15 millions of people in Egypt is affected by the low proportion of the total value of the Egyptian cotton received that reaches the *fellaheen*.

I need not restate at any length the fact that Egyptian cotton in these days has to meet competition from Brazil, the Soudan, Uganda, Peru and other parts. That is well known to you all, and to our Egyptian friends, and I am quite sure that it does really act as a stimulus to them just as competition that we may meet in other directions acts as a stimulus to us. I think that we have got to aim at giving an article to the world which on parity is fully equal in value to any competitive textile of the world. We, in the cotton trade, have always claimed to be in the forefront of those who are civilizing mankind. As a matter of fact, in the dark places of the earth, probably cotton goods have been the first instrument of barter which has started the process of civilization, and we consider that that process should be going on and on, and developing from year to year. There is a great business in front of us, and it emerges from one of the topics which comes under discussion this morning—New Uses for Cotton Goods. I think I am not in any way stating anything to which any lady could take objection when I say that a lady will wear anything or nothing, just according to the decrees of fashion, and it is for us in conferences like this, and at places such as we saw yesterday, to try to educate the taste of the world, to see the virtue and the value of cotton goods. I consider that the art of clothing is the art that humanizes mankind. That particular position is entrusted to us who take part in this Congress. We are supposed to be the leaders in the cotton trade, and it is for us to lead, and if we do not do so then we are not fit for our job. We recognize that the ebb and flow are subject to natural conditions, and we must get into the minds of the folk that we come in contact with day by day such ideas of the virtue of cotton goods that there will be a constant widening of that particular flow upon which the prosperity, the happiness and the beauty of this world depend.

I do not think we need to be too pessimistic with regard to the cotton trade position. We have been disturbed by a great world war, and that natural advancement of 2½ per cent. per year, which had been constant for 30 or 40 years before the war, ceased; but one can see that when the world gets running back into its normal life the progressive position will reassert itself; and if, as I said a short time ago, we can get the price parity on a proper plane, and maintain it there, then, with the mechanical ability and the wonderful equipment which there are in the mills of the world, with the finishing processes which have been developed, and with all the talent which is now being used in order to touch the fancy of the world, I am quite sure we have no need to adopt that pessimistic frame of mind which so many people do adopt.

So far as the Egyptian side is concerned, I have one or two more things to say. The very first question is the question of humidity. I am glad to tell you that we have made an arrangement whereby the members present of the Alexandria General Produce Association will recommend to their colleagues the adoption of a certain percentage of moisture content as being the basis upon which the trade shall run, and we, as spinners, have agreed to recommend to the spinners of the world a similar figure for adoption for a twelve months' trial. I want to tell you, perfectly plainly, I know my spinner friends when they hear the figure announced during the progress of the debate will be very disappointed; but we have limited the experiment for twelve months, and I think that as the result of that experiment the views which spinners hold, and which are built upon experience, will be fully justified and perhaps a better figure arrived at.

I want to congratulate the Egyptian experts on two or three things. The first is that they are not trying to develop too many new varieties. Spinners do not want them. Dr. Balls tells us that it is essential that they should have a minimum number, should any accident occur to one or other He tells us, too, something which is a great statement to make, because it is quite contrary to what has been believed in days gone by, that cotton properly protected is immortal. That is a great thing for him to say, and I am quite sure that he will live up to the statement that he has made.

Then, with regard to these new varieties, I am glad to see that the growers understand the difficulties of spinners in introducing them, both with regard to shade, finishing properties, and so forth.

There is also another matter which comes up under a different heading, that is, the mixing of varieties. I want to say that, knowing the interests of the Egyptian Government in this particular matter, I am quite sure that ultimately the mixing of varieties will be properly dealt with.

What I have indicated to you with regard to Egyptian cotton will have repercussions in every cotton-growing country in the world, and I am quite sure that the American section of the cotton-spinning industry and those who manufacture and finish from American types will reap ultimately quite as great a reward as we in the Egyptian section shall in the immediate future.

EXTENDED USE OF COTTON TEXTILES.

Dr. W. **Böhm** (Germany) read the paper as reproduced in the "Miscellaneous chapter" in this issue, and moved the following resolution:—

> "This Congress recommends to every country affiliated with the International Cotton Federation to establish a Cotton Propaganda Committee, in order to examine ways and means which might lead to the extension of the use of cotton goods, and this Congress requests the International Committee to enter into close contact with these various national committees in order to co-ordinate their various activities."

Lt.-Col. N. **Seddon Brown** (England): It gives me very great pleasure indeed to second the resolution which Dr. Böhm has put before the Conference. I do so because I believe that in the distressed times that the cotton industry is going through this is probably one of the most important matters that a Congress such as this can deal with. I have read with very great interest Dr. Böhm's very excellent paper, and if I might be allowed to do so I think we might divide it into two lines of thought. The first that he directs our attention to is the new uses of cotton, and the second to which our attention is called is the propaganda which is necessary to make the properties and the advantages of the fibre which we spin, namely, cotton, known throughout the whole world.

Now to deal very briefly with the first—new uses of cotton. If we look back I think we will notice that during the last ten or twenty years the progress of time has brought several things to the front with regard to cotton; but of all things that have come forward I think we can safely say that nothing has consumed as much cotton as a new article, viz., pneumatic tyres; and it is illustrations such as these we should look for. I firmly believe that if these committees, such as Dr. Böhm suggests in his resolution, were set up, if we got the most energetic men who knew their job, men selected for their versatile brains, there are other articles which can be found which will probably use cotton, if not to the same extent as pneumatic tyres, yet to a very large extent. How many of us thought thirty years ago that millions of bales would be consumed in the making of pneumatic tyres? Surely committees such as those suggested might explore every avenue to see if we cannot find other things which would consume cotton to a similar degree?

If we study the excellent report which our energetic Secretary, Mr. Arno S. Pearse, made after his visit to the United States of America I think we shall agree that our friends in America have advanced further than other countries in this search for new uses for cotton. When we observe that cotton fabric is being used for road signs, and cotton is even being used in the construction of roads, surely it will impress us with this fact: that every channel is worthy of exploration in the hope of discovering every possible purpose for which cotton can be used.

Let us seriously turn our energy and direct the very best brains contained in the industry to this matter of vital importance.

Now to look at it from the second standpoint, that is, what can we do with regard to propaganda to make our fibre upon which we live popular? I believe that the world does not realize to the full extent the properties of cotton, and I believe that money spent to a large extent on propaganda would bear fruit and would bear interest upon the capital outlay.

Dr. Böhm draws our attention to a point which is a very difficult one for us to get over, and it is that in the distressed state of the industry at the present moment it is difficult to find the necessary capital to advertise efficiently, and, as he very rightly points out, advertisement cannot be done with effect unless it is done efficiently and on a large enough scale.

Well, I believe that the day is coming nearer when the various countries which consume cotton will see fit to spend a large amount of money on advertisement; but, in the meantime, what can we do? Are we to wait for years until we can find money to advertise cotton as it should be advertised? I would just submit that we can do something in the meantime. For instance, cannot those of us who are engaged in the cotton industry, cannot those of us whose livelihood it is, spread some propaganda ourselves in this matter? Further, there are the hundreds of thousands of operatives whom we employ, and I believe a scientific education of them would cause propaganda to be spread which up to the present moment has been neglected. This is a thought which, in my opinion, could be acted upon without delay.

To my mind, it is an extraordinary thing to see a man, such as we do see, who makes his living out of spinning or weaving cotton, wearing a silk shirt. And what is the object of wearing a silk shirt if you are a cotton spinner or manufacturer? I can tell you, quite straight, that a shirt can be made from combed Egyptian cotton which will look as well, if mercerised, as any silk shirt that can be produced. It is a more hygienic article to wear; it will wash better; it will wear longer, and at the root of the whole matter is the fact that it will use up the cotton upon which you and I depend for our livelihood. We can go on with instances almost *ad lib.* on this matter. Look at all of us who smoke. Why do we use matches made from wood? I am glad to see that in Spain nearly every time you light a cigar or cigarette you consume a few strands of cotton that somebody has spun. I believe, and I believe firmly, gentlemen, that we should look at these things and we should set an example. Again, I would submit that cotton can be adapted to almost every use which leather is put to. Harness, military accoutrements, strappings, all sorts of webbings can be made from cotton. We do not want to advertise leather; we do not want to use leather for anything, I submit, except for the soles of our boots, and I believe if this propaganda was quietly spread by ourselves it should go forward. Again, it seems to be thought that if the sheets which are put upon a guest's bed are worthy of a high-class household they should be linen. What a few people know that if you make a cotton sheet—not the ordinary cotton sheet which we buy in any shop, but if you take the trouble to buy the best Egyptian cotton, or Sea Island cotton, and if you comb it and make a sheet of it, after it has been to the laundry it has a more silky, cool feel than the finest linen which can be produced, which would cost twice or three times the money.

Now, gentlemen, my plea is that we should study the wonderful natural properties of cotton. I am aware that cotton is known as the cheapest clothing in the world, and quite rightly so, but there we should not let it rest. I submit to you that cotton is the most hygienic clothing in the world. We are taught in countries such as England, with cold climates, from our childhood to wear wool next to our skin. Why? Have we ever thought it out? Wool is not the right thing to wear next to our skin. Cotton is more hygienic; it throws off dirt easier; it washes better, and it wears longer and it shrinks less. We should be taught, and a careful analysis of cotton and its properties will teach us to know, that if a garment of underclothing is correctly constructed from cotton medical evidence can be found to support the fact that it is the best garment that can be worn next to the body. Again may I illustrate that: Cotton has been proved in recent years to be the finest clothing in the tropics. If cotton is dyed in the correct shades it will resist the blue rays of the sun which cause sunstroke better than any other fibre or any other filament. Such things, I submit, Mr. Chairman, should be studied by scientists. I believe that the cotton industry needs to know not only the best way to grow cotton in Egypt: it needs such men as Dr. Balls, who is studying the growth of cotton. It needs such men to study the use of cotton, and it needs medical men to study the uses of cotton, in addition, and we should know the whole of its properties, and base our claims upon scientific knowledge.

Now, sir, there is one other side to this question. There is the competition that cotton has to meet from other fibres, and particularly from new fibres. Art silk is probably one of our greatest competitors at the present moment, but it should not be so. Gentlemen, I submit that art silk is not a worthy competitor of cotton. There is no filament produced which can stand the tests and prove to be of the utility of our fibre—cotton. We should look upon art silk not as a competitor; it is nothing to be afraid of. We should use it as an adjunct to our industry. I believe that a cloth constructed entirely of artificial silk may have certain attractive properties, but it cannot hold its head to a cotton garment; and I further believe that if we use art silk and cotton together we can produce cloths wherein we get the hygienic properties, the washing properties and the strength properties of cotton, using the silk simply for its decorative effect upon the garment.

Take, for instance, lingerie cloths. Why use real silk or artificial silk? Crêpe-de-chine can now be produced from a combination of fine cotton yarns woven together with acetate silk yarns that has an appearance second to none, and which has wearing and washing qualities of the very highest degree. No, gentlemen, the filament known as artificial silk should never be regarded as a competitor to cotton; but, by all means, let us study its properties and see how we can make it more and more useful in the construction of cloths when combined with cotton, thus finding work for our looms.

Therefore, my submission is that there is a very great deal in the proposal which Dr. Böhm has made. He has directed our attention to something which I believe we have been missing. We have been apt, like the general public, to look upon cotton simply as nothing but the cheapest clothing in the world. My submission is, sir, that it is more than that: it is the best clothing in the world, and it is up to us who spin it, and who make our livelihood from it, to be able to prove our case throughout the world. (Applause.)

Sir THOMAS SMITH (India): I have been exceedingly interested in Col. Seddon Brown's speech. A lot that he has said would make propaganda. From papers received from India I find there is going to be an intensive propaganda in the interests of a competitive fabric, for which it is claimed that it resists dirt, but washes well in hot or cold water; no other fabric is so easy to clean nor dries as quickly; its colours are absolutely fast; it is cool, and guards against excessive heat; and medical evidence goes to show that by wearing it there is a marked improvement in health and vitality!

The propaganda is to take place this coming cold weather in such towns as Bombay, Colombo, Madras, Calcutta, Delhi, Lahore and Amritsar, the big distributing centres for cotton fabric goods, and I mention it as practically all of you are concerned in sending cotton goods to India. Colonel Seddon Brown has put forward some very excellent reasons for the use of cotton, and these might be worked up into attractive forms, and by the combined efforts of the various countries the case for cotton would more widely be made known.

Mr. H. S. **BUTTERWORTH** (England): Mr. Chairman, I am convinced that propaganda properly directed would go far towards solving our difficulties. The arguments used by Dr. Bohm and Colonel Seddon Brown need no reinforcement. I agree with the intention, but I do not think the resolution indicates quite the best method of achieving the desired result. The responsibility for action is too widespread, and it should be narrowed down. I should like to know if Dr. Böhm would agree to the alteration of the resolution in the following terms. The body of the resolution is as he points out, but the sense of it is a little varied:

> "This Congress recommends the International Cotton Federation Executive Committee to establish a Propaganda Committee, with sub-committees in each country, in order to examine ways and means which might lead to the extension of the uses of cotton goods, and this Congress requests the International Committee to establish and preserve close contact with those various National Committees in order to establish, facilitate and co-ordinate their various activities: the whole of the propaganda to be carried on at the expense of the International Federation."

The **CHAIRMAN**: There is just one difficulty with regard to that, Mr. Butterworth, that you may have overlooked. The International Federation works under a constitution and it has limited funds, and before effect could be given to a resolution such as you suggest there would have to be references back to every country and another Congress held, whereas the other resolution could be brought into being and effect given to it practically immediately. If you were to give notice through the English Federation that your wider view should be brought up at the next meeting of the International, and ways and means devised for financing a particular scheme, then I think you would be in order; but it is quite certain that, under its present Constitution, the funds are not available for effecting the purpose that you seek.

Mr. H. S. **BUTTERWORTH**: I quite agree with that. It is within your own knowledge that this question of funds has crippled this question. It has been recommended before, and has already been discussed locally, in England, and there is nobody prepared to find the money, and I think that the International Federation is the proper body to find it, and to pay in ratio.

The **CHAIRMAN**: I am not disagreeing with Mr. Butterworth in the slightest degree, except to tell him that there must be a given process carried through if the International Committee is to carry it out, and it cannot be done until it has been referred to all the various members of the International and brought up at the required meeting of this character, to carry the suggestion into effect. Is there anybody else who would like to speak?

Mr. F. **HOLROYD** (England): I should like to make one suggestion, that Mr. Butterworth alters his amendment to this effect: That the International Committee, at their next meeting, be called upon to consider very seriously whether it cannot become the International Federation's business.

Mr. **BUTTERWORTH** (England): Yes, that would suit me.

The **CHAIRMAN**: That is a reference which I think we can all accept. That does not need a resolution, but it can go through as a resolution from the English Federation, if Mr. Butterworth will bring it up there at one of our meetings.

Is there anybody else who wishes to speak to this resolution? Whilst the speakers have not been numerous, I think, at the same time, the speeches have been effective. I am perfectly in agreement with all that has been said by Sir Thomas Smith in dealing with the claims of other commodities. I can tell you this, that we have been testing the properties of certain of the artificial silks, and if you get them wound on to a bobbin with any paint on you will find that they will eat the paint off within a fortnight. Consequently one would hardly like to recommend that this particular type of artificial silk should be worn next to the skin, and particularly the hydroscopic character which keeps all the moisture on the surface cannot be good for humanity. With regard to the other point, the advertising side, we must be in agreement. Most of you in this room, as a matter of fact, do it from time to time. You have been trained to do it by the value of advertisement. It seems to me if we can develop a scheme along the lines of Colonel Seddon Brown's speech, it will bring into further use cotton goods.

Are you prepared to agree that we should let this resolution pass forward in the usual way for settlement on Saturday morning? (Agreed.)

Mr. **ARNO S. PEARSE**: May I say that I have a cable from Mr. Walker D. Hines, the President of the New York Cotton Textile Institute, in which he says he extremely regrets that he is unable to be present. Most of you will remember from my American reports that this organization has undertaken a special campaign for extending the use of cotton, and it was for this reason that I was anxious to get the experience of our American friends to guide us. Mr. Hines has contributed a most exhaustive paper on this subject, describing the very thorough work which is being carried out in U.S.A. for the purpose we are discussing. I recommend to you all the study of his paper which you received a few days in advance of this meeting. Further copies of this paper are available in this hall.* Mr. Hines states that undoubtedly the U.S. cotton industry has received a substantial increase in the volume of its business through the propaganda undertaken.

STANDARD OF MOISTURE FOR EGYPTIAN COTTON.

I will now ask the Secretary to read the resolution which is the outcome of two days' deliberations of the Joint Egyptian Cotton Committee.

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* The paper is reproduced in the Miscellaneous chapter of this issue.

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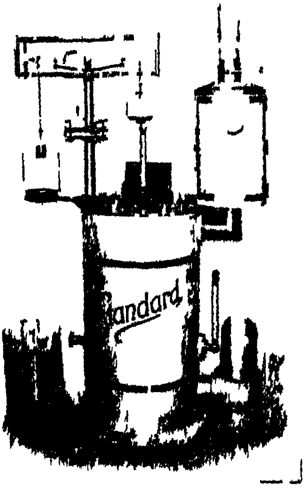

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The Secretary read the following —

" Whilst the spinning members of the Joint Egyptian Cotton Committee are firmly convinced that 8½ per cent is an adequate allowance for moisture content in Egyptian cotton, they are prepared to enter into an agreement with the Alexandria General Produce Association that, for a period of 12 months commencing 1st December, 1929, and as a temporary measure only, they will not claim for excess moisture, unless 9 per cent regain is exceeded, in which case the rebate will be retrospective and start from 8 9 per cent "

The **CHAIRMAN** I will call upon Dr W Lawrence Balls to deal with this and other Egyptian cotton matters I think Mr C H Brown has something to say, too, in connection with the new varieties Dr Balls will begin with the question of humidity

Dr W **LAWRENCE BALLS** (Egypt) At the Zurich meeting of the Egyptian Committee I issued some figures relating to what was meant by the "natural moisture content" of cotton in Egypt, and pointed out that when the cotton was in quite small quantities it was practically nonsensical to speak about natural moisture at all It might vary from one place and at one time to another place at another time to such an extent that the natural moisture content in one place and at one time was 2 per cent, and in another place and at another time it was 20 per cent That meant that natural moisture content was meaningless in such a variable climate as that of Egypt—variable during the day—unless the time and place were specified So much for very small pieces of cotton

Now, for very big quantities of cotton, complete bales, the question seems more familiar * We know that the bale changes in weight It dries up in a dry store and it gets damper in a damp store, but there is no evidence showing us exactly how those changes take place with the big bale I happen to have a piece of apparatus which made it possible to take continuous weighings of the bale every second of the day, and every day of the week, if necessary, and I turned this on to keep a record of how the moisture content changed if we exposed a steam-pressed bale from Alexandria in the drier climate of Cairo Now the moisture content of the air in Cairo varies enormously During the summer we range from 40 per cent or 30 per cent at midday, up to 90 and 100 per cent at night How does the bale react to that? You have here some small bales Now, a little bale like that (indicating) changes its moisture content during the day to this extent, that fully two liqueur glasses of water pass out of the bale during the day and come back into it during the night—something over 20 grammes of water, two liqueur glasses What about the big bale? The change in the big bale is about so much (demonstrating by means of glasses) A quarter of a litre of water leaves the bale during the day and comes back again during the moist night This bale which I was weighing was brought from Alexandria where the climate is much damper than in Cairo, and the daily change is much smaller It had been in store for a long while Brought to Cairo, it proceeded to act as follows Every day it lost, say, two glasses of water, and every night it regained one glass, and so day by day gaining, losing, gaining, losing, losing on the net result about so much water each day (indicating with glasses of water). I had it in my laboratory sixteen days, during which time it lost between two and three litres of water. It went back to Alexandria, and I have no doubt that by now it has regained, not at the hands of Alexandria but out of the Alexandria air, all the water that it lost in Cairo. The other point of interest is that these daily changes happen almost entirely on the surface of the bale. The long-period changes go deep into the bale, but the surface changes are quite interesting, and they may be extremely sudden. I have talked about this in the papers before you, but I just want to show you a graph which illustrates the extraordinary rapidity of the change, so rapid that under certain circumstances a steam-pressed bale will change its weight by a whole pound of water in five minutes. This piece of paper represents from *here* to *here* about 2 lbs. weight, and it shows the weight variations of the bale in the same time-scale as the humidity diagram during four days. You see the general fall, the loss during the day and the gain at night, and you also see these enormous sudden variations which happen on the surface of the bale when, having been shut up in a quiet, still atmosphere, it is suddenly taken into the open air, as by opening windows around it, a change here of 1½ lbs. in about two hours, and including changes of nearly 1 lb. in five minutes. Here again the bale was shut up and stabilized, then as soon as the windows were open it started to flicker. The weight of the cotton bale is never still, except when completely enclosed in perfectly still, stagnant air.

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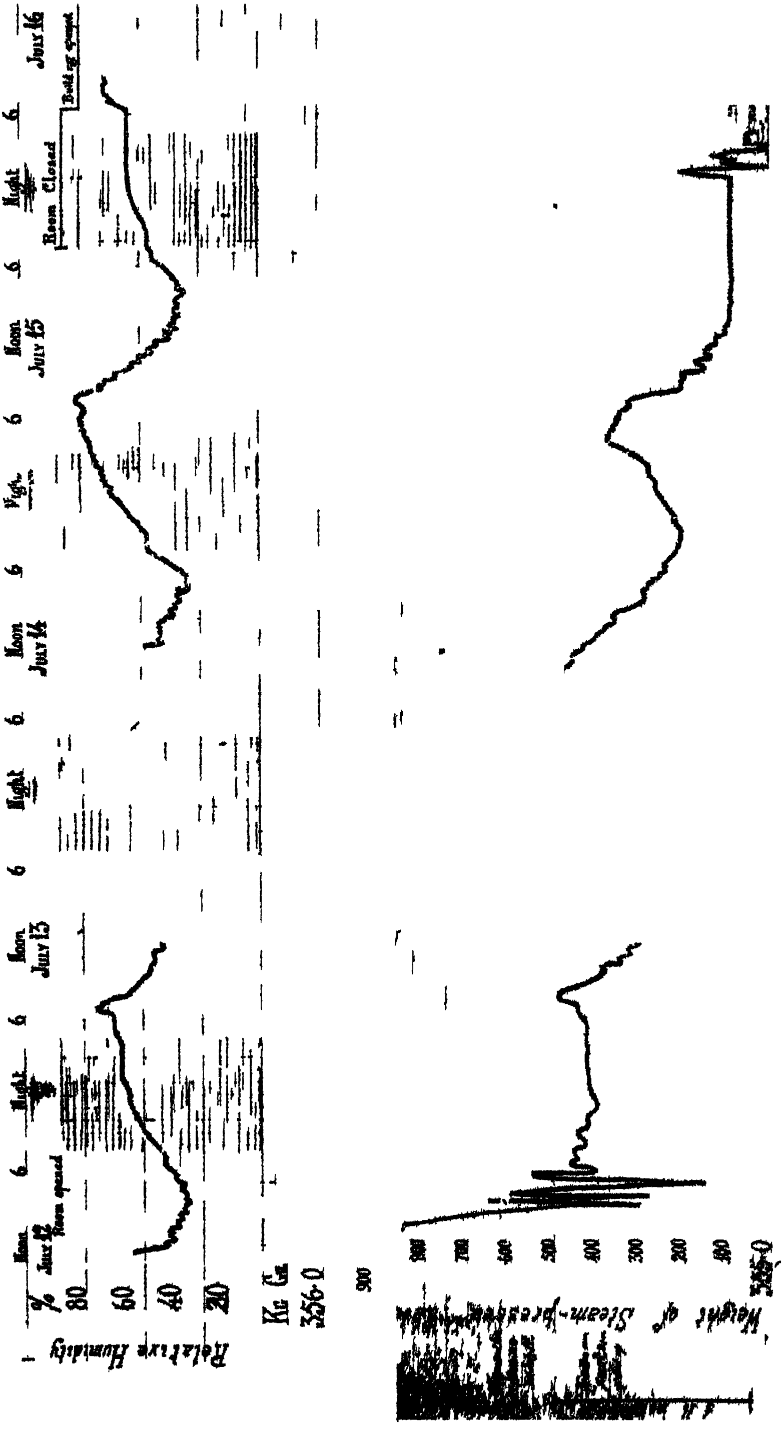
* See Congress Paper by Dr Balls, in the Egyptian chapter, entitled "The Remarkable Instability of Weight shown by Bales of Cotton "

The CHAIRMAN: Are there any questions that anybody would like to put to Dr Balls upon this matter? Of course, the Committee has dealt with it, and the Joint Egyptian Committee has arrived at certain conclusions, which I stated to you at the opening of this meeting. I think it would be as well, perhaps, if we were to leave this particular matter at the stage at which it has arrived, unless somebody desires to add something to what has been said. Our Alexandria friends do not desire to say anything, and I think the spinners are satisfied for the time being.

Mr THOMAS ASHURST (England): On behalf of the Cotton Spinners and Manufacturers' Association of Lancashire, which comprises a large number of weavers who buy yarn, I should like to know what effect the proposed resolution to raise the humidity point in the Egyptian cotton to 8.9 per cent. will have upon the sale of Egyptian yarns to the manufacturers.

The CHAIRMAN: I will put the question. Mr Ashurst desires to know what effect the adoption for the twelve months of 8.9 as a standard of moisture content for Egyptian cotton will have upon Egyptian yarn contracts. I think I can give him the answer. That for the twelve months it will have nothing to do with it unless it is taken into account by the Joint Committee in Manchester which has been appointed for the purpose of establishing a new yarn contract.

Mr THOMAS ASHURST: The only reply I can make to that, Mr Chairman, is that the Contract Committee in Manchester has not finished its labours, and it is not likely to do so for



Graphs referred to in Dr Balls address (p 26) some time, and, as a representative of the Cotton Spinners and Manufacturers' Association, we shall have to protest very strongly against any raising of the humidity content in Egyptian yarns.

The **CHAIRMAN**: I think a proper note will be taken of Mr. Ashurst's objection, and when the matter is submitted as a recommendation from the International to the English spinners your Association will have an opportunity of expressing any objections they may have.

Mr. **THOMAS ASHURST**: Thank you.

NEW VARIETIES OF EGYPTIAN COTTON.

Mr. C. H. **BROWN** (Egypt): I want to draw your attention particularly to one or two of the points which are mentioned in my paper (see Egyptian chapter), which has been distributed to you. The first point, which is of considerable interest, is the development which has taken place in our system of seed control. Since you last met in Egypt we have devoted a good deal of attention to perfecting our methods both for testing cotton varieties and the preparation of the seed of the varieties which we have decided upon, and we now claim that our whole question of seed control is at least the equal of that which any other cotton-growing country in the world possesses. We hope this seed control will ensure the quality of the varieties in a regular manner, and that each variety will only be dropped out of cultivation when we have decided that it should be replaced by a better one. You know that in the past several new varieties have been brought into Egypt. They have never been pure; they have never been regular, and they have gone out of cultivation in quite a few years. No doubt, as to some of the varieties, they should never have been introduced, and we hope to stop the introduction of such varieties. With regard to the actual varieties, I have placed on the table a map which I have divided into four sections. The first section, marked No. 1, that is, the southern half of Upper Egypt, comprises the Provinces of Girga, Kena and Assuan. It is a district I want particularly to draw your attention to, as it has two points which are of quite outstanding interest. The first point is that it is an entirely new area and is giving very high yields. To show you the rapidity of the development here I may tell you that in the year 1900 this whole district grew only 100 acres of cotton, but in the year 1910 it grew 3,000 acres. By 1920 this was increased to 15,000 acres, and in the present year, 1929, there are 75,000 acres of cotton being grown in this district, that is, equal to about half the total cotton area in the Sudan. So it is now quite an important cotton-growing district, and, we hope, will produce a great contribution to the cotton supply of Egypt.

The second point of importance is that this district we have discovered recently is suited to long-staple cottons. You know the whole of Upper Egypt has been devoted entirely to the Ashmouni type. Nobody has ever succeeded in growing successfully long-staple cotton in Upper Egypt. We have now discovered that probably quite as good quality cotton can be grown as is grown in the Delta. I have brought several samples of the two types which we are growing, Giza 3 and Giza 7, but it is quite possible that in future we shall have other types too.

In the second district, that is, the old Upper District, we have not yet discovered any long-staple type that it would suit, and we are leaving it to the Ashmouni type. We have a new type of Ashmouni which I think you will find is of good quality, but it is not very different from the old type.

The Delta, also, I have divided into two zones, which differ climatically. The Southern Delta consists of very good land, but it has not recently had a cotton to suit it. You have had Sakel grown there; you have had Pilion grown; you have had Zagora grown there and some new cottons like Nahda and Fouadi; but we have recently discovered that the highest-yielding cotton of all in this district is the Maarad variety of the Royal Agricultural Society, and we hope that this variety will displace all other cottons in the southern half of the Delta. We have in this variety a cotton which suits the south of the Delta as no other variety previously grown has suited it.

In the north of the Delta similarly we feel that the present Sakel type will have to be displaced. It is too low a yielder. That has always been the difficulty with Sakel. It can only be grown because of the high price. It can never be grown because of the yield to the grower. We have discovered other new cottons now which are giving excellent yields in the north of the Delta. The one I am particularly interested in myself is Giza 7, which is giving the highest yield. It is the same as is grown in the southern district of Upper Egypt, and this cotton, I think, will be grown exclusively in the north of the Delta, and on account of the high yield this can be produced at a much lower price than the present Sakel. We also have a new long-staple cotton, Sakha 4, which is a very good type of cotton. It is giving a slightly better yield and a slightly better quality. We are hoping that those cottons, between them, with possibly Maarad in some districts, will displace Sakel in the north of the Delta.

At the conclusion of my paper I have given a summary of some of the figures which make us feel so confident of the future of these cottons. I have shown you that the grower gets on, roughly, the present prices, an increased return per acre of about £7. I must explain to you that we have tested these very thoroughly, and we are fairly confident about them. We have tested the yields; we have found out the districts which suit them, and we have had them all thoroughly tested by spinners; and, when I say that we are hoping that one cotton will displace another in this way, it is a process which we are going to hurry to the best of our ability, and we are therefore trying to introduce these cottons to you early in their development so that you will have a chance to test them, make yourselves familiar with their qualities, and be in a position to make the best use of them when they come on the market in larger quantities.

The CHAIRMAN: Are there any questions that any delegate would like to put to Mr. Brown?

MIXING OF DIFFERENT EGYPTIAN COTTON VARIETIES.

The CHAIRMAN: I am asked to state what has been done in connection with this matter by the Joint Egyptian Cotton Committee. As you know, resolutions were passed at Alexandria and Cairo in connection with this particular subject, and, so far as the International Committee is concerned, it has merely reaffirmed the decisions there arrived at. The resolution which will be submitted to you on Saturday reads as follows:—

> "This Congress endorses the decision of the Joint Egyptian Cotton Committee in this matter, and repeats as its considered opinion that the cotton industry objects strongly to any mixing of varieties of Egyptian cottons before they reach the spinning mill"

As there does not seem to be any further question on any of the subjects which we have discussed, I think we have arrived at the end of the agenda that has been entrusted to my care, but there is one matter that I would like, just for a moment or two, to refer to. As the first President of the Joint Egyptian Cotton Committee, I am delighted at the progress that has been made by this Committee. Very, very rapid progress and many valuable results have been attained. I leave the chair with a great amount of pleasure, because I know that the gentleman who is following me is fully capable of carrying on the good work, possibly with greater effect and with greater efficiency than I could. I have very great pleasure in introducing to you His Excellency Ahmed Abdel Wahab Bey, who is the President of this particular section during the coming year.

H.E. AHMED ABDEL WAHAB BEY (Egypt): I feel greatly honoured by the decision arrived at by the Joint Committee relating to my election as President of the Joint Committee for the next twelve months. I also feel most grateful to Mr. Howarth for the kind words he has expressed towards me in introducing me to you. I seize this opportunity of thanking you for the deep interest you have hitherto taken in everything connected with Egyptian cotton. As far as we are concerned, the Egyptian Government spares no effort to meet your desires, whether it is in the propagation of new varieties, whether it is in the improvement of cotton cultivation, in the selection of seed, or in the selection of manures. In every way the Egyptian Government is doing its very best to meet the desires of the spinners in producing qualities most suitable to their requirements.

Allow me to thank you very much for the interest you have shown to-day in listening to everything connected with Egyptian cotton.

The CHAIRMAN: There is a little matter that I wish to announce to you. It is a little matter that will become a big one automatically in due course, that is, we have elected Mr. W. H. Catterall as the Vice-President of this Joint Egyptian Cotton Committee. I am quite sure the announcement will meet with your approbation.

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Mr. W. H. CATTERALL (England): I thank you for the confidence you have placed in me by appointing me to the position of Vice-President of this important Committee. I am quite confident that if I leave myself to the care of His Excellency he will see that at any time I shall be properly supported, and I will do my best from the technical point of view to assist him in the duties, which will not be too easy, because our English and European spinners are very exacting, and, if I read this Conference aright, we intend in the future to be more exacting than we have been in the past. I thank you.

This terminated the proceedings of the second day.

Friday, 20th September, 1929, was devoted to an excursion to Montserrat.

THIRD DAY'S PROCEEDINGS

September 21st, 1929.

COMTE JEAN DE HEMPTINNE (BELGIUM) IN THE CHAIR.

The CHAIRMAN: I consider myself a privileged person; in the first instance because, I suppose, as Vice-President of the International Federation and as one of the oldest members of the Committee, the honour of presiding over this meeting has been entrusted to me; and, in the second place, I am one of the few who had the good fortune of attending the Barcelona Cotton Congress of 1911. During these 19 years many changes have taken place in our ranks, but there has also been a wonderful progress in the city of Barcelona. Probably no European city has advanced so rapidly as Barcelona with its modern streets and the beautiful architecture of its houses and palaces. But not only are the buildings a testimony to the activities of this industrious and artistic population but the clothing of the people, their virile walk, the cleanliness and tidiness in all the modern parts of this great city are sure indications of the prosperity and advance which have taken place since our last visit here.

We owe a great debt of gratitude to our Spanish friends, and particularly to our esteemed colleague, Mr. Santiago Trias, a born organizer, who has proved to be a most excellent President of the Congress. In the course of this morning's proceedings we shall have an opportunity of expressing our thanks, and I will therefore not forestall you.

Besides the voting upon the resolutions which have been the outcome of our two days' discussions, we have to deal to-day with automatic looms. Cotton has a great advantage. It is not only useful, but, as we have seen from the mannequin parade, held in the afternoon of the opening day, cotton helps to make beautiful women more beautiful. It is, at the same time, not only an article of ornament but also an article of usefulness, particularly to the natives of Africa and the natives of China, India, etc., and, therefore, the question of the cheapest manner of production is of outstanding importance. In order to arrive at the lowest price of production, in my opinion, automatic looms are a very useful factor, particularly in the production of grey goods of low quality. So far, we in Europe have been in the habit of making a great variety of goods, and on account of this diversity, on account of our effort to make all kinds of cloth in one and the same mill, it has so far not been possible to use automatic looms on a large scale. But experience throughout Europe has shown that most of the advanced manufacturers have begun to experiment with automatic looms, and the lesson gained seems to point to the way in which a reduction in the cost of production can be brought about through their use.

I wish to thank those who have written papers on this subject; they are highly interesting, and we are now proceeding to their discussion.

Mr. CASPAR JENNY (Switzerland): I think those delegates interested in automatic looms have already read the papers which have been prepared (reproduced in the Technical Section of this issue), and I will now add only a few remarks.

My paper is an analysis of the returns received in reply to a questionnaire which was sent broadcast by the Head Office of the International Federation to the various countries where it was known that automatic looms were being used. I was asked by the Committee to deal with these replies from the Continental point of view, and Mr. Thomas Ashurst undertook to give the English viewpoint.

In the first place, I wish to thank the weavers of the United States who have sent very valuable answers, and to express the hope that in our Federation the same spirit of co-operation will grow. This is a necessity, and will become more and more so.

To Mr. Ashurst I will apologize when I say a few words about his paper, because there are considerable differences between his conclusions and mine, and I wish him to criticize my conclusions in the same way as I do his. It will be useful for discussion. Mr. Ashurst says sheds in the United States weaving cheap goods show much waste. I could not find, in the questionnaires, anything of that; on the contrary, the waste seems to be very small, and, concerning the efficiency, I believe in the 95 per cent. for medium counts, owing to the hard-twisted yarns and the low number of picks.

In the better-quality cloths the number of looms per weaver is about the same as in Europe. As an example, a girl in my own place has 14 voile looms, filling batteries herself. Men with battery fillers can look after 28 looms. The physical capacity is surely limited; but for mass production, even in fine-quality goods, it will be possible to get still better results than mentioned above.

Concerning the help needed, I agree with Mr. Ashurst that the figures from the United States are far too low, especially for cleaning purposes. I think we need for 100 looms at least two persons, and very often three or even four persons.

The Northrop loom is used far more than the shuttle-changing loom. The latter wants more help. In my opinion, it will become the loom for art silk especially, and for very fine cotton goods. The costs for the shuttles will be much larger than on the Northrop or on the ordinary loom, and, in my opinion, the wear and tear of shuttles will be a very big expense if the loom is not extremely carefully made; it will have to be made as accurately as a motor car. We all know that every new shuttle must be adapted to the ordinary loom, and we cannot do that with 10 or 15 shuttles in a shuttle-changing loom.

On the modern ring frame yarns can be spun almost as well as on the mule, and quite good enough in quality, and naturally very much cheaper. In one direction mule-spun yarn has a great advantage, that is, that in finishing the gain in length is much larger than from cloth made of ring yarn.

Mr. Ashurst says he could not find an answer with 80 to 100 looms per weaver. I think he did not receive all the answers, because there are several cases with 70 to 100 and more looms per weaver, and I mentioned one in my paper.

Now I will make some general remarks. The automatic loom will help us over many difficulties, and I am convinced that it must be introduced more and more if England and Europe do not wish to lose most of their foreign trade. The automatic loom will compel us to get up selling organizations, so that the weaver may specialize on big lines and not be forced to produce too many qualities. In pre-war times we had many large traders in cotton goods, but their number has diminished enormously, and we have, especially on the Continent, to deal with warehouse and retail concerns which want all kinds of cloths from one and the same manufacturer in the same contract; it is very necessary to alter these methods by creating selling centres. We ourselves must establish these new selling organizations, or we shall lose still more money, whether we employ automatic looms or not. The automatic loom should run two shifts, and then you have only to buy 40 to 45 per cent. automatic looms for the ordinary looms you scrap; and in this way it will pay very well, and the outlay will not be too great. My own experiences with attachments are very bad, and experience will show that any estimate of the cost of these will always be too low, and, finally, the attachment is not likely to give satisfaction.

Towels, velvets, and all sorts of coloured goods, with four different colours in weft, are now being woven on automatic looms with great success. The most expensive loom, made as carefully as possible with first-rate tools, will be far the cheapest. Modern preparation machinery, spooling and warping, will improve the efficiency of the looms a good deal, and these items must not be overlooked when putting in automatic looms. Further, I recommend the individual drive for automatic looms. You will get a far better cloth with it, and it will save expense. At the Barcelona Exhibition you can see an automatic loom running with 200 picks. Although with automatic looms you can have high speeds, I rather think 200 picks is a little exaggerated. In my own place I have many automatic looms running with 180 picks, and the efficiency is quite successful.

Coming to an end, I wish once more to say that, in my opinion, the number of automatic looms will grow in Europe; indeed it must grow in Europe if we are not to lose our trade much quicker than we all think, and, I believe, the time is not very far distant when there will be far more automatic looms running than ordinary looms. The ordinary looms have had their time, as, for example, the steam engines, which are, on the Continent at least, practically no more in use.

Mr. THOMAS ASHURST (England): As every one of you has had a copy of the paper prepared by me, I therefore do not propose to read it. I thank Mr. Jenny for his very mild criticism of what I have written, but I want to take this opportunity of saying that all the figures referred to in my paper are not my own figures; they are those extracted from the replies to the questionnaires sent out by the International Federation.

I want to emphasize, on behalf of the English manufacturing section, that we do not get sufficient sympathy and help from the workpeople to enable us to make a more extended use of or experiment with the automatic loom. I agree with Mr. Jenny when he states that it is not possible to run an automatic loom economically if you are to be tied down to 48 hours per week. We must, and we shall have to, make other arrangements before we can use them on any large scale in our own country. With regard to the figures in America, I still maintain that these are in favour of my statements. I have checked them more than once.

Mr. F. ARROWSMITH (England): I have pleasure in speaking on the automatic looms; I have been married to them for something like 20 years. The tale has been told at these Congresses about the gentleman who was asked to give the bride away, and the remark was made that he could, but he would not. In my case I am prepared to give the bride away, or, rather, to give advice to the bridegroom about the chance that he should give to the bride in order that she could be a successful wife.

The remarks I am going to make, I hope, will be useful to the operative, to the tackler, to the foreman, to the manager and to the owner.

After 21 years' experience of the automatic looms, naturally one knows a good deal of the difficulties as well as the advantages of them.

As to the automatic looms, I am going to disagree with both of the last two speakers; first, when they say that they cannot be successfully run only on a 48-hour week. I say that the automatic loom is an advantage *all* the time, but that it is not so great an advantage as people would make it out to be. If you are sitting on the top of the column of despondency and think you are going to jump off that column into a feather bed, and lie there comfortably with success, simply through installing automatic looms, you are going to make a very big mistake. You cannot do it. You have to put more brainwork at the head, and more ability as regards your foremen and managers into the automatic loom than you have for the ordinary loom. There is no hiding that fact.

Regarding the operatives; I do not think the operatives, the weavers themselves, require quite as much skill as with the ordinary loom, but as soon as you leave the lowest-paid workers you then immediately get to a position where you want more brainwork and more ability and more efficiency. I do not think that can be denied for a moment by those who absolutely know their work. The workpeople, I think, should adopt the automatic loom with open arms. We have had raised at this Conference the matter of extending the uses of cotton goods, and the only way they can be extended for the purposes of Europe, Asia, Africa, America, and everywhere, is in relation to the matter of the price of cotton goods in order to compete with other fibres. The operatives, I agree with Mr. Ashurst, ought to put their backs into the work.

I have enjoyed reading Mr. Ashurst's paper, but I agree with Mr. Jenny on the waste figures. I am sorry to have to disagree with Mr. Ashurst's figures, but, in my opinion, he is wrong. There is very much less waste in automatic weaving, as far as I know (and I am speaking more particularly of the Northrop loom, of which we have 1,350), than on the ordinary loom. Those who have the ordinary loom using mule cops know that the waste is something like 5 per cent., whereas with the Northrop loom the amount of waste is something like 1½ per cent. That is an enormous saving, and, I should imagine, is confirmed by other automatic looms to a very large extent. Of course, positions differ. With a feeler loom you are going to get a greater amount of waste than you have with the non-feeler automatics.

With regard to the foremen, let me say this to prospective buyers of any sort of automatic looms. You have made your tacklers before out of ordinary weavers with no practical mechanical ability about them. The automatic loom—and I do not care which automatic loom it is—is more of a mechanical proposition than it is a weaving proposition. You, therefore, must have your tacklers with more of a mechanical inclination than a knowledge of weaving.

I would like to return to the operative for a moment. In our own country the operatives and the tacklers have succeeded in getting a very much larger wage than is paid on the ordinary loom, doing away with some small proportion of the saving. I do not quite see why they should have as much as they have got. I think the automatic loom tackler's advance is as much as 25 to 33⅓ per cent. over the ordinary tackler's wage. I think that is too big, and does away with part of the profit.

Regarding the matter of falling on to a feather bed, in my opinion, the automatic loom, if well worked, will show a saving on the ordinary loom of from 7½ to 15 per cent. All of those in this room, finance-men especially, will agree that if they can get 7½ to 15 per cent. on their money they would be very well satisfied, if it were positive. But, when you get 7½ to 15 per cent. on your money, if somebody else is prepared to lose 25 per cent. on their money on the ordinary looms, you are still going to be faced with a loss on your work, and that is the reason why some of us who have had automatic looms, as well as others, all this time have not been able to show better results. As long as the average losses are so very high, the automatic loom as well has got to show a loss of a smaller variety.

In spite of the fact that in our own case we are in the China market, the worst market in the world, and that we have seen some of our competitors out, we are still going without some sort of moratorium. I do think that the automatic loom can be a success even with 48 hours, though, of course, it will be a bigger success if it can run twice as long.

I should like to refer to the owner. The owner who puts automatic looms in must realize that the purchase of the looms does not get him over his difficulties. He has got to follow up the automatic loom carefully himself. An installation of 10 looms or 20 looms is not giving the machine maker a fair chance unless it is followed up by the owner to see that the right thing is done to the loom after it gets into his shed. What occurs is this: The owner buys twenty expensive looms, and puts them in. He says to the manager: "I have spent all this money; there are your looms; work them," and he does not go near them again for months. The manager does not understand these looms—they are fairly difficult to understand, although they look simple—and he says to his inside manager: "Right! Now then, Jim, all these looms are in; work them; you have go to do it The boss has spent a lot of money." He leaves them alone. The inside manager says to the foreman: "Get on with this job," and he foreman tells the tackler to get on with it. Before very long nobody of a really influential character, who is using his brains, goes near them, and the tackler says: "I do not like these things," and he knocks the automatic arrangement out of use altogether, and instead of having an automatic loom it is working like an ordinary loom all the time. I have bought at scrap-iron prices looms of which the automatic adjustment had hardly been worked at all: it had been put out of action, and the owner said it is no good at all. It is not a fair deal to the machine maker. The owner himself must put a little bit of energy and brain into following it up, or he will fail on a small installation. In our case, it was a case of sink or swim. We had 1,000 Northrop looms in, and we put in 350 more in an extension in 1919 to 1921, which, of course, with bad trade have been a white elephant. You all know what has been occurring since 1922, when these looms started. That is as far as the owner is concerned, and I think it covers the machine maker.

There is another thing on which there is very much slack thinking, and which one of our Manchester papers got me to give an article on, that is, the biggest number of picks per minute and the number of machines. You must decide in your mind, are you going in for production per machine or production per operative? The automatic machine is expensive. Can you afford so much capital that you can run them at 160 picks a minute or 150, or put less capital expenditure in and have the looms running faster? If the machine is running slow you can get a lot of looms looked after by one operative—like they say in America, 100 looms per operative. I do not doubt it. You have two factors, then; a capital expenditure which few mills with ordinary looms in would be able to afford, and if you are going in for production per machine you put in fewer machines and run them more quickly, up to 200 per minute. I say the economic position—and it is only my idea—on a plain cloth, 36 inches, is about 172 picks a minute. But it is purely a matter of opinion.

There is another thing. Looms put in 21 years ago, of the automatic type, which I am used to, are not to be compared with the looms that are being made to-day. The cost of repairs and renewals of the old looms is something like 75 or 100 per cent. more than it is with those that are put in to-day.

I think I have given you all the information I can in order that you should treat the automatic looms, when they get put in, with reasonable sense and ability, and do not think that because you have put them in they are going to work themselves and keep themselves. They will not do it. In my opinion, perhaps being egotistic, it requires more brainwork and ability to run an automatic shed than it does to run an ordinary shed.*

The CHAIRMAN: Does any other gentleman wish to speak?

Mr. ARTHUR KUFFLER (Austria): I believe that the question of automatic looms is, perhaps, more a social question in the first instance than a technical question. As long as the matter is not settled with the workpeople you cannot change the system of the loom and you cannot introduce automatic looms with general success; that is to say, with automatic looms you employ less people and you pay a higher wage. Of course, Labour is, in the first instance, always against this principle. They do not want to employ less people and pay to those fewer people a higher wage and allow other people to lose their work. Well, it is wrong; but they will not understand it in the beginning. It has been explained here, and I think it is perfectly right, that we are in a vicious circle. If we cannot produce cheaply we cannot produce big quantities; we are put back. It stands to reason that if you reduce the number of hands in the beginning you will be able to employ more hands in the end. If you run, as we run now, at a higher cost than, say, the United States and Japan, and therefore lose trade, the number of hands are reduced too, or they have to go on short time and make less wages. Now that is the first lesson which Labour has to learn. With the automatic loom you must know, and the workpeople must know, that in the beginning less persons are employed, but they can get better wages. They can make better wages. In the long run, it will come to the same thing if what has been said is right, and I believe it is right, that the trade, by producing cheaper cloth on large lines, will grow, and more people can be employed. I do not think that you can say you can employ an automatic loom only in two shifts. Certainly, if you invest money in new machinery, the cost of depreciation, and the interest on the machinery are lower if you run the machinery in two shifts than if you run it in one; but, as I had the opportunity of saying on the first day of this Congress, the loss incurred by overproduction may be much greater than the profit made by reducing the overheads. But that is a question of the trade in general. It is not a question of automatic looms. Now, one of the great mistakes in the use of automatic looms, both from the point of view of the owner as well as from the view of the workpeople, is that you want to stabilize a certain number of looms, so you agree with the Labour Syndicate or with your union to run 12 looms, or 16 or 20 or 22 looms. That is all wrong—absolutely wrong. I have been in America this year, and I was taken by Mr. Sidney S. Paine, of the Textile Development Corporation, Boston, Mass., who has reorganized many mills, to two of these mills. One was weaving a heavy kind of blue damask, that was blue warp and blue weft, dyed in the raw cotton and spun-dyed, a very heavy cloth. There the weaver attended to 18 looms. Then he took me the same day to another mill that made surgical dressing cloths. There I saw myself what some of you do not seem able to believe, but it cannot be contradicted—it was a mill with 676 looms, and there were six weavers and six girls. They attended to from 108 to 130 looms, according to how the looms were placed. I spoke with one of the operatives, and he told me that he could take just as well 150 looms. He said there is nothing to do.

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* Later note by Mr. Arrowsmith: I have not found any opposition from Labour leaders to automatic machinery.

You cannot make an agreement for a fixed number of looms; it depends upon the kind of work you do. It is all the same to the workman as to how many looms or spindles he attends; he has to do a certain amount of work per hour; that is, he has to piece so many ends. I will give you, for illustration, any figure that comes into my mind. He can piece 30 ends in an hour. It is all the same to him whether it is 30 ends breaking on four looms or whether they break on 50 looms. If 30 ends break only on a certain number of looms, he can attend to that number of looms, and therefore all these definite arrangements with the workpeople, that a weaver, whether a girl or a man, attends 18 or 20 looms, are all nonsense. It may be too much in one case, and it may be too little in another case. In one of our mills on ordinary grey cloth they are running at present 28 looms with a battery filler, and in the same room there are looms that work striped goods, with two or three colours; in this case the weaver attends to seven looms, and when we were taking time-tests it was shown that with the seven-loom weaver his time was taken up to nearly 90 per cent., whilst with the 28-loom weaver it was taken up to 63 per cent. only. That is to say, it all depends on the kind of work. Therefore the question of an understanding with the workpeople is the main question when dealing with automatic looms. I think it is useless to talk about the technical side of it, because the automatic loom is in the beginning of its development. Now that the Draper patents have run out, every textile machine maker in the world will work on automatic looms, and we shall find many new systems and improvements of old ones.

The same arguments apply with regard to speed. I do not quite agree with what has been said, that you have to make up your mind as to whether you want the machinery to work to its utmost capacity or the worker to his utmost capacity. That depends, again, on the quality of the work. What you want is good work. If you run a loom so quickly that you have more breakages it does not pay you to run it at that speed. You must run it to the utmost, but where it makes the least breakages of any, then you can get the biggest number of looms per operative. The automatic loom is still in its infancy. You may have in a year or two automatic looms that run 220 picks, and you may have looms that do all kinds of work. I do not agree with our Chairman either, when he says that for cheap goods in grey cloths the automatic loom has its merits, but for the fine cloth, which we intend to popularize, as Colonel Seddon Brown said on the second day, the automatic loom does not lend itself. I do not think that is right. If it is right now it may not be right to-morrow. In America—I have seen it, and I can give the name of the mill; it is one of the biggest silk mills—they make the finest silk on the automatic loom; not the shuttle-changing loom, but on looms with the ordinary battery. In America they pretend—and it has been proved—to make better quality cloth on an automatic loom than on the ordinary loom, of course working with a feeler and stopping the loom when the weft breaks. It is absolutely wrong to let the loom run on. You can do it, of course, but then you have a faulty cloth. I do not know whether you save 7½ or 15 per cent., but in the end there must be a saving.

The standard of living of the working class must increase: it can never go down. It may have gone down in some countries after the war, but in ordinary times the standard of life of a man must increase; therefore you must find a means whereby you can give way to his demands, whereby you can avoid great friction with the workpeople and produce as cheaply as other people do in other countries. That is only possible with an automatic machine.

I think we must all agree that the loom which has been used up to now is no machine at all; it is a very simple tool that has not changed for 80 years. No improvement, or hardly any improvement, has been made. You can use to-day an ordinary loom that is 50 or 60 years old, provided it has been well kept; there has been no change in its construction. But the automatic loom has been made into a machine. The word has been used by Mr. Jenny to-day that they have to be made as exact as a motor car. Well, the loom is sure to become a machine, and, while we have had no great changes in the last 30 or 40 years, great changes have begun, and the quicker industrialists open their eyes to those changes the better. But the first and foremost question is that you cannot be limited by a fixed agreement with the workpeople. The workman's only interest is that he is not sweated; you do not demand more work from him, more turns of the hand from him. If you can provide him with a tool that allows him to give more production with the same work it must be done. If you cannot do that, of course, it is absolutely unprofitable to introduce a new and costly tool.

Mr. WALLACE I. STIMPSON (U.S.A.): I have not prepared any speech. Mr. Pearse asked me, about five minutes ago, if I would say a few words. I have been with the Draper Corporation for a great many years, and have been connected with the development of the Northrop loom. I have been very much interested in the talk I have heard here to-day. It is very different from what I had expected, and it is very different from the talks I have had with various people.

We have, as you know, probably about 500,000 automatic looms running in the United States. We have naturally developed a scheme for running these looms. In our northern section we were more troubled in getting them properly running than in the southern section. It was merely because our northern section had been in the business so long. Their fathers had always done things in a certain way, their grandfathers had done things in a certain way, and they felt that they should do things in the same way. Gentlemen, it is a great mistake. I cannot tell you, in this country, how to run automatic looms. You have conditions which are very different from what we have in the United States, and you must solve your own problems, but I will say this, that I do not believe it is possible for the cotton industry to exist unless we continually put into our mills the most improved machinery and the most improved methods. It is not possible for any great length of time for one section of the country to be running 50, 60 and 100 looms per weaver with a helper, and another section with, we will say, two to four with a helper. The time will come when you will find that you have liquidated your mills; you have nothing left in them but some old machinery and an old mill, and you have no money to put in the new machines. So do not try to figure too much on what percentage you are going to make. Can you afford to do it? You must do it—not only looms, but all other machinery. You cannot keep up with the times, you cannot sell your goods in the markets of the world if your machinery is old, if your labour cost is too high. You must be able to meet anybody in competition, anywhere in the world, and you cannot do it with antiquated machinery, with antiquated methods and with antiquated brains. It cannot be done. I was very much interested in hearing what the gentlemen who spoke before me had to say. The running of automatic looms is just a simple problem in arithmetic. That is all there is to it. At what speed should you run your loom? You should run your loom at the speed at which you can produce the kind of goods you want to produce for the smallest cost per pound. Now that may be one speed to-day; it may be another speed in a year. You may have changed conditions. At any rate, it is not a question of whether your loom should run 200 picks a minute or whether it should run 160. They should run at a speed, under the conditions under which you are working, where you get the kind of goods you want for the smallest cost per pound. With regard to the number of looms per weaver: how many looms should a weaver run? I have been asked that question for 30 years, and it took me a long time before I found out how to answer it. A weaver, with a helper, can start up in ten hours from about 275 to 300 looms. Now, then, if 20 looms average stops 275 to 300 times, give them 20; it is all they can run. You are perfectly foolish to give them any more. In other words, do not guess at the number of looms a weaver should run. Do not overwork your weaver; you cannot do it for any length of time, and it is not fair. A weaver should give a fair day's work for a fair day's pay, and you should not try to give them more than a fair day's work. Now that formula has been figured out—the gentleman before mentioned it—in the United States, and we know it is correct in our country. The next proposition is, if a weaver can start up a certain number of looms a day, to find out why those looms stop. Do not guess at it. Put somebody on with a pencil and a piece of paper and tabulate why your looms stop. If you have 25 per cent. of loom stoppage caused by what we call kinks, where the yarn doubles up on itself, in other words, slack yarn—all right, there is something to work on. I can tell you in the United States just what is causing most of it; how much stoppage is from bunching, and how much from other causes. Have it all tabulated every second of the day, and then when your superintendent, or you yourself, or whoever it is, goes into the mill, you have something definite to work upon. So, in that way, reduce the number of stops per loom. As you reduce the number of stops per loom increase the number of looms per weaver, but do not expect a weaver to start up in 10 hours more than 275 to 300 looms; if you do you are not fair to the weaver.

The CHAIRMAN: Does somebody else wish to speak?

Dr. BRUNO CANTO (Italy): I was not prepared to take part in this discussion, and I only do so on short notice on the instigation of Dr. Mylius, the member for Italy on the International Committee, in order that some information be tabulated from Italy, in which country the cotton manufacturers, through some oversight, did not receive the enquiry form mentioned by Messrs. Jenny and Ashurst, that had been sent out by the International Cotton Federation.

The "Manifatture Cotoniere Meridionali," of Naples, of which I have the honour to be manager, have 2,500 automatic looms running, which represent 75 per cent. of its looms; they are working in three different plants for the production respectively of grey cloth for bleaching and printing, for coloured goods and for wide sheetings.

Plant for the Manufacture of Grey Cloth for Bleaching and Printing. This consists of 1,615 narrow looms in one single shed, which work in two shifts, warp 32's and 38's, weft 32's and 44's, without feeler. Every female operative has 38 looms in her charge. A magazine filler has 32 looms to attend to. The tackler looks after 96 looms. The magazine fillers could have a larger number of looms to look after if the bobbins came straight from the ring spindles. In our mill we use cardboard tubes, and the operatives have to set them on the proper holders.

The efficiency is 95 per cent.; the waste of the weft is 1 per cent.

We have not found any difficulty in giving 48 looms to the weaver without reducing the percentage of production, but the cost turned out to be more than when the weaver had only 38 looms, in consequence of the better quality of yarn and the special care required in the preparation. Nevertheless, we have in operation two sets of 48 looms for demonstration purposes.

In this section the number of threads for each weaver is about 120,000. The number of picks is always 160 per minute.

The total number of persons employed is 150 for each shift, which works out to 9.28 per 100 looms. The preparation, with the exception of slashing, works with one single shift, and it is of the usual type with flanged bobbins. The knots are being made with a Barber-Colman knotter. There are also two of Barber-Colman's warp-tying machines in use.

The plant. with its departments for the conditioning of the yarn (which comes from the spinning mill in its natural state), inspection and classification of the cloth, repair shop, etc., employs altogether 540 persons, i.e., 270 in each shift of the cloth mill.

Plant for Coloured Goods. This consists of 756 narrow looms, 86 to 190 cm. wide, for the production of goods with a warp which is generally coloured doubled (twisted) yarn, and the weft generally dyed in the raw material and the yarn spun directly on Northrop pirns. Goods containing numerous threads are being made here, up to 40 per cm.; a feeler is being used. Not more than 16 looms, eight narrow and eight wide ones, can be given to one weaver; the output is about 85 per cent. Four kinds of weft are being used: 8's, 12's, 16's and 20's. The number of battery fillers varies according to the counts used.

The most important question for this kind of goods is the thickness of the warp in relation to the width of the dents of the reed. It is not possible to adopt automatic looms for this kind of cloth unless the knots of the warp pass easily through the dents of the reed. Either the goods must be of a loose weave or with several threads per dent, with few threads or with different threads per dent. The total quantity of threads has a relative importance.

The weaving shed works in double shift. The lighting system is powerful, owing to the difficulty the operatives have in seeing the threads, which generally are of a dark colour. The speed is 170 picks per loom of 86 cm., 145 for those of 146, and 125 for those of 190 cm. wide. The looms are driven by gear and individual electric motors.

Plant for Wide Sheetings. There are 96 looms, 240, 280 and 320 cm. wide, the speeds of which are 100, 90 and 80 picks per minute. Double shift is being worked, 16 looms per female weaver, with an efficiency of 90 per cent. We have tried, in view of the small number of operatives required, to run a third shift, but the result has not been satisfactory. The output of the three shifts was practically equal to the one of the two shifts, as during night many things are neglected which have to be put right during the day, and that necessitates stoppage of looms. With these looms there is no feeler motion.

General Considerations. In the three mills the waste is not superior to that of the ordinary looms. It is even less where no feeler is being used. None of the yarn is rewound.

The large number of looms given to one operative is due to the harmonious relations between employers and labour unions as a consequence of the corporative organizations in Italy, which have put an end to the conflicts between the two classes of employers and employees. The trade unions are not opposed to a large number of looms being given to the workpeople when the work does not put them to a strain above the normal physical capacity. Furthermore, they have accepted the quite logical principle that the remuneration must not be in proportion to the number of looms, but to the actual work performed by each operative.

Two ordinary looms weaving a difficult cloth or using a bad warp would require more work and more weaver's skill than 48 automatic looms with a good quality yarn and an easily woven cloth.

At any rate, I cannot conceive why the automatic loom should not be used to the very limit of its industrial possibilities. In view of the high cost of the installation and the important amount of interest and depreciation which result from its purchase, the automatic loom can only be an advantage if run to its full capacity as regards number of workpeople as well as number of hours of work.

The opinion has been expressed in this Congress that even with one shift the automatic loom can be profitably worked. Allow me to tell you that it is ridiculous to think of an automatic loom being kept idle 15 or 16 hours out of 24. The objection of overproduction, which the world fears with the general application of the two-shift system, can easily be overcome if, instead of two looms, only one loom is erected. I cannot see why a thousand ordinary looms should not be replaced by 500 automatic looms run in two shifts.

It seems to me that we can sum up the whole situation as follows:—

Conditions under which the erection of Automatic Looms may be of advantage:—

(*a*) When there is a scarcity of operatives.

(*b*) When the available labour is unskilled or unsatisfactory.

Indeed it is easier to train a weaver for automatic looms than for an ordinary loom, as an automatic one is more easily handled than an ordinary one, which requires a long training.

(*c*) Where there is available a good staff of overlookers and tacklers. The satisfactory results depend mainly on this class of help.

As already mentioned just now, the automatic loom is more a mechanical than a weaving proposition, and therefore tacklers with a thorough mechanical knowledge are required.

(*d*) When plants with a large number of looms can be erected.

Automatic weaving requires careful direction, and this is expensive. It requires the application of principles of scientific organization, and this is rarely available in a small undertaking; it presupposes the adoption of such means as the warp-knotting machines, which do not pay except on a given number of looms.

(*e*) When easily woven goods and standardized goods are produced.

(*f*) When the composition of the warp is not too close in relation to the counts of yarn and reed to be used.

(*g*) When there are no artificial limitations in the number of looms given in charge of a weaver.

(*h*) When the shed can work double shifts.

(*i*) When the mill spins its own yarn, or when the yarn can be bought in the immediate neighbourhood from a restricted number of mills with the certainty that there is no difference in uniformity of the quality of the yarn.

(*j*) When it is not necessary to use the weft feeler.

This must be understood in such a way that the greatest advantage as regards labour and production of waste can be obtained when there is no need for the use of a feeler. This means that for the goods without feeler the automatic loom can be profitable also in such countries and under circumstances under which the automatic loom would not be suitable for goods to be woven with a feeler.

(*k*) Finally, when there is plenty available money which such an installation requires.

It is evident that all of these conditions will not exist at one and the same time. It may be that only one condition, such as, for instance, the scarcity of labour, may decide the advisability of installing automatic looms.

As regards the cost of installation, it must be said that the automatic loom does not mean simply a loom, but a number of other things; spare tubes for the weft (pirns) representing a huge figure, changes to the spinning machinery, more perfect preparation machinery, improvement in the conditioning plant and in the lighting of the shed, and other small more or less important expenses.

Finally, I must make a reference to the remarks of Mr. Jenny, where he speaks of 108 picks of a loom of 90 cm. Surely he must mean 90 inches. But it seems impossible to me that a workman can properly attend to 107,000 warp threads with a satisfactory production.

Mr. ARNO S. PEARSE (England): The President wishes me to mention the automatic loom which I saw recently in Japan. You will receive, during the next few days, a copy of my Japanese report, and there you will find full particulars of the Toyoda loom. Far be it from me to recommend any special loom, but I am simply stating in the Japan Report what I have seen, and I can assure you that the loom, according to evidence produced, was working very satisfactorily. I have watched the loom making 205 picks per minute on ordinary grey shirting. The number of looms per operative varied in the different establishments —40, 50, and in some there were only 25. It is a Japanese invention. The looms, so far, are expensive. The cost in Japan is £60 sterling, but they expect, in consequence of mass production, to bring the price down to about £40. I understand that Platt Bros., of Oldham, have bought the patent for making the loom in Europe. 205 picks, of course, is considerably higher than any other automatic loom which I have seen under mill conditions.

The CHAIRMAN: Is there any other gentleman who wants to speak on the question? I think we have had a very interesting discussion, and I give my best thanks to all the speakers, and we will go on to the next item on the agenda.

ASSOCIATE MEMBERSHIP OF THE INTERNATIONAL COTTON FEDERATION.

Mr. ARNO S. PEARSE: With a view to extending still further the usefulness of the International Federation a set of rules has been suggested in order to enable Cotton Exchanges, Bleachers', Calico Printers', Textile Machinists' and other allied associations to become associate members of our organization. The Committee has endorsed these rules, a copy of which was circulated along with the Congress Programme; they are as follows:—

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* A Toyoda loom may be seen working at Platt Bros.' showroom in Oldham

Rule 1. Cotton Exchanges, Bleachers', Calico Printers', Textile Machinists' or other allied associations are eligible for associate membership with the International Cotton Federation, subject to their acceptance by the Committee or Congress.

Rule 2. An annual levy of £1 1s. per individual member comprised in such associations shall be paid, but where the members number less than 25 the total of the annual levy for the association shall be 25 guineas (£26 5s.).

Rule 3. Such affiliated associations will receive for each one of their individual members a copy of the quarterly publication of the INTERNATIONAL COTTON BULLETIN.

Rule 4. Associate members will be entitled to attend the international Cotton Congresses, but they will not have a vote. They may suggest to the International Committee subjects for the discussion at either Congress or Committee Meetings.

Rule 5. Associate membership does not entitle to direct representation on the International Committee.

Mr. ROGER SEYRIG (France): On behalf of the various gentlemen who are here as our guests belonging particularly to the Cotton Exchanges of Europe, I have been asked to say that according to the suggested rules they would hardly have the right to speak at the Congresses, and that permission they think ought to be granted to them.

Mr. WILLIAM HOWARTH (England): It does seem to me that Rule No. 5 does not express sufficiently well the meaning. It says: "Associate membership does not entitle to direct representation on the International Committee." As a matter of fact it is intended that associate members shall not have a chance of ever being elected on the International Committee. Our organization is one of cotton spinners' and manufacturers' associations and the direct representation on the International Committee must at all times be restricted to representatives of that industry, who are either cotton spinners or manufacturers. This particular rule, whilst it says that it does not entitle to direct representation on the Committee, does not exclude the possibility of non-spinners or non-manufacturers taking part as delegates in the discussions of this Congress. I know the intention of the Committee, and I think it ought to be made clearer than what is expressed in this draft of rules. I think if you leave it in this way, the wording will be corrected later on, but I do wish to stress the point that everybody who enters under the associate rules should be perfectly acquainted with the facts beforehand, that they cannot become members of the Executive Committee.

Mr. W. G. CRYER (England): May I ask a question in regard to suggested Rule 2, governing levy for associate members, as I take it that the Committee in submitting these proposals has given full consideration to the relative equity of the new associate membership basis, compared with that governing present membership of the International Federation. Would this annual levy of one guinea per individual member in the case of an association like the Liverpool Cotton Association, with approximately 600 full members and 900 associate members, necessitate a total levy of 600 guineas or 1,500 guineas; and for a combine like the Bleachers', with 80 associated firms, would the levy work out at 80 guineas per annum? It seems to me that with an association like the Liverpool Cotton Association, and its large proportion of associate members who are at present connected with the International Federation through the Federation of Master Cotton Spinners' Associations, there would be the possibility of a duplication of service and expense, without achieving any useful purpose, as the latter members are already receiving copies of the INTERNATIONAL COTTON BULLETIN through the channel of their own Spinners' Federation

I think we shall agree that the more we are able to get the different sections of the cotton trade linked together in some common organization the better it will be for our trade as a whole, because after all we are parts of one and the same industry, and no one section can continue to prosper indefinitely whilst another section is languishing below starvation point As my friends are aware, we have on several occasions during recent years approached the allied trade organizations in Manchester with a view to bringing about some reduction in what we consider to be their exorbitant charges, but with no great measure of success Had, however, these bodies been affiliated with us in some form, such as is now proposed under the scheme for associate membership of the International Federation, our efforts might have been attended with more gratifying results

To come back to my original question, would Rule 2 mean, with an Association like the Liverpool Cotton Association, a subscription basis of £1 1s for all its members, or for its full members only, and in the case of the Bleachers' Association £1 1s for each of its constituent or amalgamated firms?

Mr F HOLROYD (England) That we felt was the intention, but these are only provisional rules for the time being What we want this morning more than anything else is the acceptance of the principle that we agree to allow the election of associate members through the Committee The difficulty that you have raised now with regard to Liverpool does exist I am an associate member of the Liverpool Association There would be duplicity of interests, but if you will give the Committee instructions to finally draft a series of rules that is really what we want you to do this morning

Mr A KUFFLER (Austria) May I move that Rule No 2 be struck out of this present resolution, and instead of Rule No 2 there should be inserted

> "That the Congress authorizes the International Committee to fix a levy for the associate members"

Mr F HOLROYD (England) Yes, we might accept that

Mr H S BUTTERWORTH (England) I am grateful to Mr Cryer, who spoke with regard to the Liverpool Cotton Association, for protecting our interests, but I did not think, personally, that any violence was being done to them by this resolution As a matter of fact, my Liverpool friends, I feel sure, will forgive me when I say that I think that in this matter and in other similar matters they get off with paying too little I think this is a very mild subscription, and as I read the rule wondered if they were paying enough I think the INTERNATIONAL COTTON BULLETIN that we get from time to time is quite worth the amount of money that we subscribe, and I do not think it ought to be reduced I should think the resolution should stand as it reads

Mr F HOLROYD (England) May I put a different resolution to the meeting, that is, that this Congress endorses the action of the Committee in proposing that associate membership should be instituted and it leaves with the Committee the arangements for accepting such associate members I move that

Mr A KUFFLER I second that

(The resolution was put to the Congress and carried unanimously)

THE CHAIRMAN The next item on the Agenda is the Financial Statement

FINANCIAL STATEMENT

Mr ARNO S PEARSE The financial Statement has been sent to each affiliated Association at the end of last year It has been duly audited, and I have here the duly signed balance sheet by the Auditors I think we may take this statement as read

This course was adopted

RESOLUTIONS

The various resolutions were then discussed and voted upon, the following is the text of the resolutions which were unanimously agreed upon by the Congress —

EAST INDIAN COTTON

This International Cotton Congress endorses the many advantages which would result from the general application of the Cotton Ginning and Pressing Factories Act, but it regrets that so far this Act has not been sufficiently enforced, and it respectfully asks the Secretary of State for India to use every means in his power that this legislation will be effectively carried out in future throughout India

This Congress laments the falling-off in quality of Punjab-American cotton generally through admixture with other kinds, and it expresses the hope that steps will be taken to keep this and other varieties from being mixed

The fact that the Punjab-American cotton raised on the British Cotton Growing Association's farm in India has improved, shows that there is no need for this general falling-off in quality

The Congress also desires respectfully to indicate to the Secretary of State that a more efficiently conducted system of marketing this Indian cotton of better staple and grade would extend the number of spinners using it, and thereby create such a demand as would enable the grower to obtain a more adequate recompense than has hitherto been possible owing to the restricted market operative

COTTON GROWING

This Congress, representing the cotton users of 21 countries, desires to record its unanimous appreciation of the efforts which *are being made in many countries with a view to increasing the supply and improving the quality of cotton. This Congress records with satisfaction that Europe is consuming annually over 2,000,000 bales of cotton grown in countries outside the old-established sources of supply, and calls upon the Governments of all countries where cotton growing can be carried out on a commercial scale to give every assistance in their power for extending cotton cultivation, especially by facilitating the provision of means of transport and irrigation, where necessary.*

EXTENDED USE OF COTTON TEXTILES.

This Congress recommends to every country affiliated with the International Cotton Federation to establish a Cotton Propaganda Committee, in order to examine ways and means which might lead to the extension of the use of cotton goods, and this Congress requests the International Committee to enter into close contact with these various national committees in order to co-ordinate their activities.

METHOD FOR REPORTING CONDITIONING TESTS OF EGYPTIAN COTTON.

The spinners' representatives of the Joint Egyptian Cotton Committee unanimously recommend to the affiliated spinners that, whenever a test for humidity is made on their behalf, they should if requested, communicate the result to the respective cotton shippers in Alexandria.

MIXING OF DIFFERENT EGYPTIAN COTTON VARIETIES.

This Congress endorses the decision of the Joint Egyptian Cotton Committee in this matter, and repeats as its considered opinion that the cotton industry objects strongly to any mixing of varieties of Egyptian cottons before they reach the spinning mill.

STANDARD OF MOISTURE FOR EGYPTIAN COTTON.

Whilst the spinning members of the Joint Egyptian Cotton Committee are firmly convinced that 8½ per cent. is an adequate allowance for moisture-content in Egyptian cotton, they are prepared to enter into an agreement with the Alexandria General Produce Association that, for a period of 12 months commencing 1st December, 1929, and as a temporary measure only, they will not claim for excess moisture, unless 9 per cent. regain is exceeded, in which case the rebate will be retrospective and start from 8.9 per cent.

Mr. W. MATHER (England): Mr. President, before that resolution is passed I want to make the position clear as regards the Cotton Spinners and Manufacturers' Association of England. The representatives of the Cotton Spinners and Manufacturers' Association (Weaving Section) desire to state that they will abstain from voting on the proposed resolution in order not to prejudice their position with regard to the fixing of a standard of moisture content in yarns in excess of that already in operation. That is, from our point of view, we do not want to prejudice our case as regards standard of moisture.

Mr. W. F. **CHAMBERS** (England): It is of the utmost importance that moisture should be kept down to as low a percentage as possible, and it is a very serious matter indeed to raise it by ½ per cent. when we are already as high as 8½; and I am surprised, as an individual member of the Congress, that the Spinning Section should have given way, even if only in a temporary manner. That they should be allowed to increase it to 9 per cent. is a very serious matter indeed to manufacturers generally. We are doing all we possibly can to safeguard ourselves. If it is possible for it to be in cotton in its very early stages it is up to the growers, and to anybody who handles cotton right up to the finished article, to take every precaution possible to keep it down.

Mr. W. **HOWARTH** (England): Everybody sympathizes with Mr. Chambers in his desire to have cotton, and not water, delivered to him, no one more so than the spinners themselves, but I would remind him that this is the first step to that end. Hitherto, if 10 per cent. moisture has been in cotton, the spinner has had no redress, and this is the first step, and the first time in the history of the cotton trade where we have had a standard put forward for all cotton. We are hoping to improve during the current year, or at the end of next year, and I think the representatives of your Association will be wise to accept the resolution as it stands, because it does not prejudice them in any way. Now that the Association has said that they will not support it, but they refrain from voting, I think it would be just as well if Mr. Chambers were to ally himself with his Association.

(The resolution was adopted. The delegates of the Cotton Spinners and Manufacturers' Association refrained from voting on the last resolution.)

LEVY FOR 1930-31.

It was unanimously resolved that the levy should remain unaltered for the coming years, viz.:—

1/100th of a penny per spindle.

¼th of a penny per loom.

PLACE OF NEXT CONGRESS TO BE HELD, 1931.

Mr. **ROGER SEYRIG** (France): On behalf of the French Syndicate of Cotton Spinners and Manufacturers, I have the pleasure and honour of inviting the International Cotton Federation to hold the next Congress, in 1931, in France. I am rather diffident in doing so, on account of the wonderful reception and diversified programme which we have had here, but I assure you that we in France will do our best to make you welcome. I may say that in 1931 a Colonial Exhibition will be held in Paris, which should be of considerable interest to most of you.

Mr. F. **HOLROYD** (England): I have pleasure in moving that this Congress accepts with many thanks the kind invitation of the French Association to hold the next Congress in France in 1931.

Mr. ARTHUR KUFFLER (Austria): I have pleasure in seconding this.

(*The resolution was unanimously adopted.*)

The CHAIRMAN: I have great pleasure in conveying to you, Mr. Seyrig, the unanimous and hearty resolution of this Congress "that we accept your invitation with many thanks."

VOTES OF THANKS.

The CHAIRMAN: We have now come to the end of our deliberations, and there remains one pleasant duty for us to perform, and that is to offer our cordial thanks for all that has been done for us here in Spain, especially to our colleague on the International Committee, Mr. Santiago Trias, who has proved himself such an excellent President. His extreme modesty has added great charm to all he has done on our behalf. We shall not forget his great services, and I am sure you will heartily agree that we offer to him in the usual manner our expression of thanks. (Great applause.)

Our thanks are further due to the Mayor of Barcelona and to all the officials who have put this magnificent hall at our disposal; further, to the Spanish Cotton Spinners and Manufacturers' Association, to its Executive Committee, and to the Barcelona Congress Organizing Committee, who have had the difficult task of arranging our Congress and the many social functions which we have all enjoyed to the fullest extent.

Thanks are also due to the authors of papers, and to all those who have contributed in any way towards making this Congress such a success, both from a business and social point of view.

These votes of thanks were most cordially adopted.

Mr. SANTIAGO TRIAS: As President of the Congress, I thank you, Mr. President, and all the delegates, very much for your kind words. We feel sure that this Congress may be regarded as one of the most successful ones which our organization has held, and I hope also that you have spent some pleasant days in Barcelona. We trust that you will carry away with you a favourable impression of our city, and that when you go back to your various countries you will tell your friends all that you have seen here, and ask them to come here; I assure you that we shall receive them with sincere friendship. I take this opportunity of acknowledging publicly to my friends of the Spanish Committees and of the Spanish Federation my best thanks for their hearty co-operation.

The General Secretary made the announcement that when the Joint Egyptian Cotton Committee was holding their deliberations they sent a telegram to H.M. King Fuad, expressing gratitude for the co-operation and assistance he was gracious enough to give to the work of that Committee. A reply had been received that day from His Majesty, signed by himself, reading as follows:—

> "I am sincerely pleased to receive the telegram which you have sent in the name of the Egyptian Joint Cotton Committee, which met at Barcelona. I thank you cordially, and express

the hope that this Committee will continue to act for the best interests of the cotton industry. I am happy to be able to assure you of my entire co-operation and of my best wishes for the success of the aims it has set itself, and which I consider are most worthy.''

This terminated the fourteenth International Cotton Congress.

CONGRESS PROGRAMME.

The business items on the agenda are recorded in the preceding pages of the Official Report of the Congress.

The following is an enumeration of the social functions, and a few other items:—

WEDNESDAY, *September* 18*th*, 1929.

3-0 p.m. Visit of Old Barcelona by motor car.

5-30 p.m. Tea offered in the Restaurant "Miranar" of the Exhibition by the Chamber of Commerce and Navigation.

A Mannequin Parade, showing Cotton Dresses, held during tea. (The dresses worn by the mannequins were kindly supplied by Messrs. Horrockses, Crewdson & Co. Ltd., Preston. The whole of the material had been made at their mills).

9-0 p.m. Banquet offered by the Spanish Master Cotton Spinners and Manufacturers' Association at the "Fine Art Palace," Paseo de Pujada, Barcelona.

THURSDAY, *September* 19*th*, 1929.

6-0 p.m. Tea offered by the Municipal Government and Spanish dances in the Pueblo Español of the Barcelona International Exhibition.

FRIDAY, *September* 20*th*, 1929.

Excursion to Montserrat by motor car.

Visit of the cotton mill of Eusebio Bertrand, at Manresa.

Lunch offered by the Spanish Cotton Spinners' and Manufacturers' Associations at Montserrat.

Visit of the Monastery.

Return to Barcelona in the evening.

SATURDAY, *September* 21*st*, 1929.

3-0 p.m. Visit to the Palace of Textile Industries in the Exhibition, and inspection of special textile machines.

4-30 p.m. Film of the Fine Cotton Spinners and Doublers' Association Ltd., Manchester, depicting cotton growing and spinning, in the "Palacio de Proyecciones" of the Exhibition.

5-30 p.m. Tea offered by the Provincial Executive in the Old Palace, Plaza de la Constitución, Barcelona.

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COTTON GROWING IN NEW COUNTRIES

SPAIN.

Cotton Growing in Spain.

Paper by Mr. ALFREDO SEDÓ, Barcelona, prepared for the 14th International Cotton Congress.

Cotton growing in Spain may be a new subject for the International Cotton Congress at Barcelona, but it cannot be said that cotton cultivation is really a new industry for Spain; it is rather a reborn industry for us, as in the eighteenth century it certainly occupied quite an important position, but since then, principally owing to the preponderating extension of the cotton-growing industry of U.S.A. and to the development of cane sugar in the cotton-growing districts of Spain, this crop was given up. However, at the beginning of the present century, attempts were made to restart cotton growing within Spain, but, in spite of a few favourable laws for its promotion, it cannot be said that cotton-mill men of Spain took any interest in the movement until 1918, when they were encouraged by a few agriculturists who recognized the importance which cotton growing for Spain might reach. These people visualized the independence in cotton from the rest of the world which Spain should be able to conquer in this raw material of primary consideration, and they very soon obtained the highest support in the country; their movement was enthusiastically supported by H.M. King Alfonso XIII, who created a Spanish Cotton Commission, which since 1923 has been actively and successfully at work.

This Cotton Commission, besides establishing a permanent Central Committee, appointed other provincial committees which collaborate amongst each other. They have shown such zeal in their work that it is expected that Spain, within comparatively few years, will produce the quantities of raw cotton which will satisfy entirely the needs of her own cotton-spinning industry.

From the very outset it must be stated that Spain possesses all the favourable climatic conditions, and immense areas of suitable land; there is much more land available than is needed to supply our cotton wants, and the yield per hectare is pretty high, as we will state later.

Very careful instructions have been given to the farmers as regards the technical aspects of the method of cultivation, and to the different diseases and pests; a staff of technical experts advises on the selection of the land, and gives all the instruction that may be needed.

In order to stimulate cotton growing the minimum purchase price which is to be paid for the crop is fixed in advance, so that the farmer knows beforehand—except when, through unforeseen circumstances, his crop is destroyed or suffers in yield—what his crop will sell at, and our minimum price is remunerative for the cultivator.

Besides the minimum prices paid in the various seasons so far, it has been possible to make the farmer who has had a small yield some allowance for the shortage. Money prizes and agricultural implements have also been awarded for high yields. The overseers have also received cash prizes.

The seed used is known under the name of "King," imported from the United States, has been handed to the cultivator, and with fair conditions of soil the plant produced in Spain is identical with that obtained in the United States, the difference in quality being only slight, according to the district of cultivation; of course, such differences exist even in the United States.

As regards class and colour, our cotton is more similar to Texas cotton than to Atlantic cotton and, referring to staple, very good results have been obtained, and in certain districts its length is superior to the American standard of 1 in., and certainly the average of the crop is not inferior to $\frac{15}{16}$ in., American standard.

As regards the strength of the fibre, very good results have also been obtained; we can assure you that we have the most excellent reports concerning the resistance of the fibre.

The ginning station of Tabladilla, near Sevilla, contains the latest machinery; the building has been constructed specially for the purpose, and is truly a model station.

At the present time the Cotton Commission is engaged in erecting up-to-date ginning factories in the various cotton-growing districts.

The Cotton Commission possesses a laboratory with the latest equipment of instruments of precision; it has even the necessary spinning plant for the determination on practical lines of the yarns that can be produced from the lint grown.

Referring to the following particulars, it should be mentioned that in 1928-29 exceptional rains caused serious losses, but, considering that cotton growing is still in its infancy, we have every reason to be satisfied.

The cultivators state that for the season 1929-30 there will be 13,152 hectares under cotton cultivation.

SEASONS

	1924–25	1925–26	1926–27	1927–28	1928–29
Hectares cultivated ..	1,473	2,164	4,607	4,624	7,786
Seed cotton (kg.)	860,444·30	1,097,967·90	2,166,164	1,607,832	2,120,903
Lint (kg.) ..	274,303·30	368,870·21	724,997·75	553,533·50	697,377
Linters (kg.)	274,303·30	14,579	36,054	36,444·50	58,839
Seed (kg.)	408,937·60	673,513	1,315,721	97,906·80	1,382,021
No. of bales of Lint	1,154	1,108	3,599	2,670	3,207
No. of bales of Linters	1,154	54	158	164	237
Average Kilos Lint per Hectare—in 5 years' period					121·5
Maximum Yield in one season					186·2

Review of the Work Regarding Cotton Growing within the British Empire.

Paper prepared for the International Cotton Congress at Barcelona, September 18th to 22nd, 1929, by WILLIAM HOWARTH, Esq., J.P. (Member of the Executive Committee and the Council of the British Cotton Growing Association, and also of the Executive Committee and Administrative Council of the Empire Cotton Growing Corporation.)

It is especially gratifying to me to have the privilege of reading this paper to you, as I was one of the founders of the movement of Cotton Growing in the British Colonies and have kept in close touch with the work since its inception, and am a member of the Executive Committee and Council of the British Cotton Growing Association, and also on the Executive Committee and Administrative Council of the Empire Cotton Growing Corporation.

Looking back nearly a quarter of a century many here will remember how the failure of the cotton crops in America through attacks by pests or unfavourable climatic conditions caused serious losses to employers, and in some cases much distress to operatives engaged in the cotton spinning and manufacturing trades of the world, and, to prevent a recurrence, steps were taken by the British cotton trade to develop the industry in other parts of the world. The money was supplied by the trade and the British Government, and a tremendous amount of pioneering work has been done in almost every part of the British Empire where the conditions were considered suitable. Some parts have turned out failures, but these had to be proved as much as the successes. Harbours have had to be built, railways made, and many parts of Africa have been opened up to light and civilization from darkness through the advent and the effort to produce our fibre. I think you will admit that in this work Great Britain took the lead; much money has been spent and valuable experience gained, which has always been at the service of the world's cotton trade. Our Reports reach every country, and we have always been too glad to give advice and assistance to any other Government. The same might be said of the cotton produced—British-grown cotton has found its way into many of your mills. The total amount of cotton with a staple of 1 1/16 ins. and over produced in new fields in the British Empire, including parts of India, is roughly one million bales, which you must admit has made a difference to prices generally, so that whether you use the cotton or not, the whole trade has received some benefit from this extra million bales. Not the least important factor is that the production of cotton in new fields in the British Empire has encouraged other countries to follow suit, and with some considerable success. At the same time these efforts of ours have been the means of stimulating even to greater efforts the older fields of America, India, Egypt, Brazil, etc. The movement has also effected almost revolutionary improvement in cotton-growing research. Many new types have been propagated and the numerous enemies of the plant in the nature of pests are being satisfactorily dealt with.

A short résumé of the work in the various Colonies, bringing the position up to date, might interest you.

INDIA.

India now produces over two million bales of stapled cotton, and this quantity is increasing annually. The country is more than self-supporting in the matter of better quality cotton for mills, and there is no need for the import of American or African cottons into India, except for those mills which specialize in very high counts.

The Indian Central Cotton Committee have now been in existence for some seven years, and considerable progress has been made in many directions during that period.

The Demonstration Farm at Khanewal continues to serve its main function in propagating the best types of cotton and wheat for seed distribution amongst Zemindars in the Colony areas. The expert staff on the Farm have now been engaged in investigating the primary cause of leaf shedding, premature opening of bolls, the comparatively poor quality of the cotton and low yields, and are of the opinion that white fly is the primary cause, and enquiries are also being made by the Agricultural Department as to the most effective and economic measures to be adopted to control this pest.

A work of immense importance in connection with India is the Report of the Royal Commission on Agriculture in India which contains many references to the work of the Indian Central Cotton Committee. It approves the efforts of the Committee to improve the marketing of cotton, to check abuses and malpractices, and to institute economic enquiries into the financing of production. The Report also comments on the importance of the work accomplished by the Committee in securing reliable statistics of the consumption and production of cotton in India.

AFRICA.

NIGERIA is a country of great cotton possibilities, and is the largest, next to India, under the British Crown.

In the SOUTHERN PROVINCES during the past year or two the native type of cotton (although it has been in some demand in Europe), for reasons of yield and low lint result the monetary return to the native grower is not satisfactory and each year has shown the increasing necessity for introducing and establishing some new variety which by virtue of its improved quality and yield would prove more suitable to the grower, and incidentally encourage planting on a larger scale. Exotic types have been tried and proved failures, in marked contrast to the success attending similar experiments in the Northern Provinces. There is, however, a native variety known as Ishan, which has many distinct advantages and produces a superior lint, and efforts are being persevered with this, and the local Agricultural Department is evolving better strains of this particular type. It is, of course, only to be expected that it will be some time before sufficient seed can be produced of this improved variety to replace the existing native type, but every year increases the supply, and it is pleasing to note that the native farmers appear to be quite eager to adopt it.

In the NORTHERN PROVINCES rainfall and other growing conditions last season were good on the whole, while the cotton crop was somewhat of a disappointment, probably because in the best producing areas the people had not fully recovered from the severe food famine conditions prevalent in 1927, and instead of planting cotton, their energies were given to the cultivation of foodstuffs, which of course is quite understandable. A new large ginnery has been completed and put into commission, and also a small pioneer plant, and the British Cotton Growing Association now have in the cotton areas in Northern Nigeria nine ginning factories which are capable of dealing with all the cotton that is likely to be produced for some time, and no extensions are contemplated for some time to come. With one exception these ginneries are either on the railway or within comparatively easy distance of it. It might be worthy of mention to observe that the two most recent ginneries have been constructed in advance of railway development, as it has always been the policy of the Association, who continually watch these matters, to attract the railway rather than to follow it up.

The SOKOTO PROVINCE shows a big improvement on the previous year, more than doubling its output.

The arrival of the railway at Gusau has enabled the Association to extend their field of operation and incidentally affords the native farmer an opportunity to dispose of his produce within reasonable distance of his farm.

Sokoto Province is capable of big developments, and it is believed that it will eventually prove to be the biggest cotton-producing field in Nigeria.

The Empire Cotton Growing Corporation maintain an Experimental Farm at Daudawa, and proposals have been made that this should form one of a series of multiplication farms for the propagation of new strains of seed for distribution throughout the country.

SIERRA LEONE.

The Agricultural Department are carrying out the selection of the local type of Quande cotton, and a number of samples have been sent home in order to obtain expert opinion as to their quality. One of the types is reported upon as being a very good result, and has been valued at 90 points on the price of American futures.

GOLD COAST.

The experiments with cotton in the Northern Territories during the past season have been concentrated on the Dagomba District. An industry of fair proportions already exists in the South of Togoland, and steps are being taken by the installation of a Power Gin at Kpeve to deal with the cotton grown locally. The Agricultural Department has been entirely reorganized, and concentra-

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tion is being effected on the three stations at Tamale, Kumasi and Kpeve. The chief Divisions now deal with inspection of plants and produce, statistics and surveys, laboratory investigations, education and training, rural economics, and publications and meteorology.

EAST AFRICA—KENYA COLONY.

The possibilities for cotton are not great, and its cultivation is confined to the north of the Kavirondo Province on Lake Victoria. However, no other cash or exportable crop is grown, and the example of their Uganda neighbours is likely to be copied by the population inhabiting the Kavirondo district, and some extension of the industry may be reasonably expected. Former transport difficulties have been greatly relieved by the completion of a section of the railway, which now runs directly through North Kavirondo.

UGANDA.

Here, where great strides have been made, cotton still maintains its pre-eminent position as the chief item of export, forming with seed 87½ per cent. of the total, and unless something unforeseen occurs its position is not likely to be seriously threatened. A note of warning was, however, issued last year that the outlook for 1928 was none too promising, as the weather conditions had been of a most variable character—the planting season was, in fact, the most difficult in the history of the industry. Later in the year, however, the weather conditions became more favourable, and while not in time to enable the natives to bring their acreage of cotton up to normal figures, the rain was in time to establish a considerable proportion of the sowings, and the outturn of cotton became greater than was at one time expected, reaching 138,486 bales. What is of more importance is the fact that the grade and staple were maintained, and were slightly better than the average.

The question of the yield of seed cotton per acre is one that demands the close attention of the Government and all concerned in the industry. The yield varies very considerably in different areas, accounted for perhaps primarily by soil, but also by the method of planting and cultivation. It is difficult to assess anything like an average yield for any one district, but while the Buganda Province consistently shows a good yield, there are certain districts of the Eastern Province which regularly show a yield of under 300 lbs. of seed cotton per acre, which is equivalent to less than 100 lbs. lint.

TANGANYIKA TERRITORY.

Last season there was a record output of 32,965 bales. In the Mwanza area, which is the second largest producing district, and where the British Cotton Growing Association are established, an increased acreage had been planted, but late and erratic rains adversely affected the growing crop. In the Bukoba Province, which is adjacent to Mwanza, the Association erected a ginning factory in response to an invitation by the Administration to create a cash crop industry for the inhabitants, who had produced little beyond their own food crop requirements and hides, and a satisfactory beginning has been made with cotton. In both the areas the industry is entirely a native one, and Mwanza holds great possibilities.

A portion of Tanganyika cotton is not quite equal to that of Uganda, and the reason would appear to be the less favourable climatic conditions and want of experience as compared with Uganda, but the officials of the local department of agriculture are quite alive to the deficiences, and everything possible is being done in the way of distributing first-class seed, and the inexperience of the native farmers merely requires time to be overcome.

NYASALAND.

It is gratifying to record a better state of things than has been experienced for the past two years. About 4,500 bales of cotton were produced last season, of which 95 per cent. was native grown. This is the best crop since 1925, when 7,750 bales were produced, and at that time about 33 per cent. of the crop was cultivated on estates controlled by Europeans, and these estates are now growing barely 5 per cent. of the total crop— in fact, the most striking feature of the cotton-growing industry of Nyasaland during the past few years has been the steadily increasing proportion of the crop grown under native cultivation. The suitability of cotton as a crop to be grown on native small-holdings, usually averaging under an acre each, may be said to be definitely established, especially in such areas as the Lower Shire, where it is planted late in the season and does not clash with the growing of food crops.

In Nyasaland, cotton comes up against a competitor in the shape of tobacco, which does particularly well in the higher elevations. There is room for both crops, and the choice of what shall be grown is best left to the individual planters, whether European or native, but it is certainly the case that European planters are now taking renewed interest in cotton as the result of improved yields obtained on experimental plots, and to the value of cotton as a rotation crop.

At the Empire Cotton Growing Corporation's experiment station at Makwapala the staff have had considerable success in their efforts to breed by selection a type of cotton that would give profitable yields in the existing conditions, and during the season 1927-28 several test plots from seed supplied by the experiment station have been grown on European estates with promising results. This year's work at the experiment stations has led to a clearer realization of the importance of the jassid pest as one of the chief limiting factors affecting cotton production in Nyasaland. The entomologists and plant breeders, working together, are hopeful of being able to eliminate jassid trouble at an early date.

In the UNION OF SOUTH AFRICA the 1927-28 cotton crop did not realize expectations, and the total, according to ginners' returns, amounted to 4,405,263 lbs. of lint, equal to 11,013 bales of 400 lbs. each, which showed an increase of 771 bales over the previous season. The Department of Agriculture attribute the partial failure of the crop as being mainly due to the exceptionally severe drought conditions which prevailed during February, and this was the chief factor causing the loss of approximately 3,000 bales of lint; subsidiary causes were poor germination of seed in some areas, the localized attacks of boll-worm, jassid and beetle. The percentages of longer-stapled cotton have shown a marked increase, although the percentage of "good colour" cotton compared with that of "off colour" has decreased.

The figures received from Government experts and prominent farmers indicate that approximately 55,150 acres were planted with cotton in the various districts, of which Natal and Zululand accounted for about 40,000 acres.

At the experiment stations of the Empire Cotton Growing Corporation the most important work of the past season has been the multiplication of the first jassid-resistant strains, and the making of re-selections from them with a view to obtaining more uniform quality. Unfortunately at both the Barberton and Candover stations much valuable jassid-resistant material was lost last season through hailstorm damage at the end of November and the beginning of December. Nevertheless the seed of the resistant strains Z.1 and U.4 supplied to farmers for multiplication in different districts gave outstanding yields everywhere. Satisfactory progress has been made with the expansion of the station at Barberton.

The ultimate success of cotton growing in SOUTHERN RHODESIA appears to be dependent on the work that is being carried out at the Empire Cotton Growing Corporation's Experiment Station at Gatooma, which has for its object the breeding by selection of a suitable type of plant, and with this end in view the Corporation's staff continue to concentrate their attention on the breeding of a jassid-resisting variety.

The amount of cotton now being grown in NORTHERN RHODESIA is almost negligible. The future of the industry is dependent on a supply of selected seed being forthcoming, and in this connection an Agricultural and Experimental Station has been established at Mazabuka. A nucleus of a seed supply has been obtained from the station at Barberton, and this seed will be grown at Mazabuka, and selection work will be carried out on the product with a view to raising a type that shall be both suited to the local climatic conditions and, so far as possible, resistant to such pests and diseases as are prevalent.

THE SUDAN.

The area controlled by the Sudan Plantations Syndicate in the Gezira last year was 105,587 acres, against 100,058 acres during the season before it. The yield, however, did not come up to the exceptionally high returns of the two former years, but nevertheless the final results were quite satisfactory, and the quantity of cotton produced was 113,169 bales, as compared with 77,665 bales for the previous season. The quality of the cotton was also quite good, both as regards grade and staple.

The Kassala Cotton Company have on their new concession in the Gezira approximately 46,000 acres. For the first cotton crop it is hoped to get at least 15,000 acres planted with cotton by July of this year. The old concession in the Gash Delta at Kassala is being continued under the control of the Sudan Government, and the crop last year was an extremely good one, both as regards quantity and quality. The rain-grown cotton crop, which is grown under the supervision of the Sudan Government in the Southern area of the Sudan, has also been very successful. Sir William Himbury, who recently visited the Sudan, is most optimistic as to this venture.

The Empire Cotton Growing Corporation's Plant Breeding Station continued its work of selection and hybridization; variety tests were also carried out with both Egyptian and American varieties, the latter both under irrigation and under rainfall conditions.

THE WEST INDIES.

The total crop of the West Indian Sea Island cotton produced in 1928 was about 5,000 bales, and although the demand for this quality is still very poor, a large portion of the reduced crop has been disposed of. The bulk of the Sea Island cotton is now produced in Montserrat, St. Vincent and St. Kitts-Nevis, and buyers have preferred Montserrat cotton to St. Vincent owing to the fibre being more regular and containing less waste.

Reference must also be made to the Imperial College of Tropical Agriculture at Trinidad, which was established in order to provide training in the science and practice of Tropical Agriculture to students intending to become tropical planters, Agricultural Administrators or Officers, or Specialists in different branches of Agricultural Science and Technology, and to offer facilities for the study of Tropical Agriculture to graduates of other Colleges and Universities. An important feature of the College is the provision for Research and Investigation work which its laboratories and fields afford. Owing to the existing dearth of properly trained men for work in tropical agriculture, it seems possible that Land Companies and Planting Corporations may see the necessity for special training of recruits for their own service, and the Imperial College offers special facilities for training men of this class who have received their preliminary scientific training at the Universities of the United Kingdom or those Dominions where such facilities for work in tropical agriculture naturally do not exist.

The prosecution of the work of the College is not only of great agricultural importance, but is also of great value to the students themselves, who thus become inducted into the methods, and furthermore the College should be of lasting value to each individual student as a place to which he can turn for real help in the new problems and difficulties which will inevitably confront him in his subsequent career.

Research on the cotton crop now devolves on the Empire Cotton Growing Corporation's Research Station, which is near by the College.

IRAQ.

Here there has been a notable increase in production, the outturn being 5,200 bales against 1,800 bales for 1927. Keen interest is being taken in all agricultural work, particularly in cotton, the cultivation of which is extending in many directions. The main growing areas are situated in and between the Tigris and the Diala Rivers, and satisfactory progress has also taken place in the Euphrates area around Hillah and Diwaniyah, small supplies have reached the Association from as far afield as Kirkuk and Mosul Most of the cotton is produced by peasant farmers on small plots, but many of the wealthier inhabitants own estates of considerable dimensions, and King Faisal has set an excellent example to his subjects in this respect, inasmuch as he is very enthusiastic over cotton growing Each year adds to the growers' knowledge, and with improvements in methods of cultivation a crop of 8,000/10,000 bales might be looked for

The Agricultural Department of Iraq have by propagation and selection produced improved strains of "Mesowhite" showing a better lint percentage The selections are now being multiplied and will be distributed in chosen areas during the coming season

AUSTRALIA.

The whole of the 1927 Queensland cotton production was bought by Australian spinners on the basis of import parity prices, but after a year's experience spinners found that the assistance given them through Government bounty was inadequate to enable them to compete with imported yarns, and arrangements were made for the overseas disposal of the 1928 crop, which was of good grade Sufficient seed to plant 30,000 acres was supplied to 2,500 growers by the Cotton Board, and 2,300 growers had advised that 25,000 acres of cotton had come to maturity The weather was exceptionally favourable to late harvesting, and the total crop of about 8,000 bales was larger than had been expected

FIJI.

Experiments are being carried out by the Agricultural Department of the Fijian Islands with a view to introducing the cultivation of a kidney type of cotton from selections made by Colonel Evans from wild stocks in New Guinea, which give promise of yielding better returns to the cultivators than can be obtained from Sea Island types Hitherto only Sea Island cotton has been produced, but in view of the uncertainty as to the market for this variety, it is felt that it would be desirable to cultivate a cotton with a freer market

OTHER COTTON FIELDS.

Amongst the other potential cotton-growing areas are Cyprus, Ceylon and Malta

On the side of Research, the Empire Cotton Growing Corporation has maintained their investigations, and their activities are fully set forth in their reports They have Experimental Stations in many places for the production of improved seed They work in co-operation with the Agricultural Departments, and the experiments undertaken by them are complementary to those of the departments, and being mutually agreed upon in advance, no unnecessary duplication takes place The same may be said of the work of the British Cotton Growing Association, which is now practically confined to the provision of ginneries, buying and marketing centres, etc It might also be added that neither the British Cotton Growing Association nor the Empire Cotton Growing Corporation have any politics and, therefore, look to whatever Government is in power for assistance in the work which they have set themselves out to accomplish No one has done more for the development of Agriculture, which of course includes cotton, in our tropical colonies and dependencies than the late Government's representatives at the Colonial Office, and I feel sure that the same enthusiasm will be shown by the present British Government

A tribute must also be paid to the good work that has been done by Governors, their Administrative Officers and Officials of Agricultural Departments in the various Colonies

In conclusion, setbacks due to climatic and other causes are inevitable from time to time, but there is no doubt that the cotton-growing industry is firmly established The figures in Appendix A of the Report of the British Cotton Growing Association show that the approximate estimate of cotton produced in Empire fields last year was 350,550 bales, as compared with 374,000 bales in 1927 The prospects, however, for the present year are more promising, and from what can be ascertained of this year's crops so far, there will certainly be increases in Nigeria, Uganda, Tanganyika, the Sudan, Nyasaland and Iraq For instance, in Uganda the crop may see the 200,000 bale mark reached, and in the Sudan for the present season 131,351 acres were planted with cotton in the Gezira, and have yielded quite well Considerable progress has been made with the development work for the extension areas, and it is hoped to have the development canalization and buildings for the whole concession area of 465,000 acres completed by July

Another good feature is the fact that railway extensions have been continued throughout the year in the Sudan, Uganda, Tanganyika Territory and Nigeria In Uganda the opening of new branch lines has obviated the necessity of transhipments across Lakes Kioga and Victoria, and the bulk of the Eastern Province cotton can now be transported direct from Uganda to the coast port at Mombasa The extension of the railway line from Tabora to Mwanza at the southern end of Lake Victoria now provides direct communication of that rich area with the ocean port of Dar-es-Salaam As regards Nyasaland, we are awaiting the decision on the proposed route of the extension of the railway to a terminus at the southern end of Lake Nyasa, but the main obstacle to progress in this particular country is the outlet to the sea which depends on the vagaries of the River Zambesi It is, as you know, crossed by a ferry, bridging the river has been advocated many times, but of course there are many difficulties

Another feature is the use of mechanical implements for preparing the land, which is particularly noticeable in East Africa Now all this is very encouraging, and providing the remainder of the season is favourable and nothing unforeseen occurs, it is believed that results so far obtained for this present season appear to be a happy augury for reaching if not advancing upon the 1926 figure of 430,300 bales.

COTTON GROWING WITHIN THE BRITISH EMPIRE

Colony or Protectorate	Area	Population	Suitability of Soil	Climatic Conditions	Methods of Transport	Approx Cotton produced in 400 lb bales in 1928	Quality	Possibilities of Increase	
								Bales	Remarks
WEST AFRICA Nigeria	Sq Miles 336 000	18 000 000	Good over large areas especially in the Northern Section	Good	Rail, motor and River Niger also by animals	25 000	Fair in the Southern Section Very good in the Northern Section	1 000 000 (minimum)	Extremely promising with improved rail and road transport in Northern Section
EAST AFRICA Uganda	110 300	3 127 455	Extremely good	Good	Rail, Lake Steamers and Rail to Port	138 500	Very good	500 000 minimum	Steady progress anticipated
Kenya	200 000	2 500 000	Good over extensive areas	Favourable in certain districts	Rail	650	Good	30 000	Agricultural supervisors needed suitable area restricted
Tanganyika Territory	365 000	4 107 000	Good in many districts	Favourable	Rail and Lake Steamers	2 965	Good	250 000 (minimum	Prospects favourable
CENTRAL AFRICA Nyasaland	40 000	1 217 000	Good	Good	Rail and River	4 500	Good	100 000	Outlook promising with improved transport
S Rhodesia	144 000	914 187	Excellent	Variable	Rail	100	Good	40 000	An improved seed also cheaper and better transport essential to any great increase
N Rhodesia	291 000	1 003 750	Ex	Variable	Rail	100	Good	14 000	
UNION OF SOUTH AFRICA	795 000	7 156 319	Good in many districts	Variable	Rail	11 000	Good	100 000	Steady progress anticipated
THE SUDAN	1 014 600	6 000 000	Excellent with irrigation	Very favourable	Rail	129 200	Excellent	1 500 000 minimum	Increase certain as irrigation is extended
IRAQ	150 000	2 850 000	Excellent with irrigation	Good	River and Rail	5 200	Excellent	200 000	Capable of large development with drainage and irrigation
WEST INDIES	12 300	1 730 000	Good in most of the islands	Very favourable	—	5 000	Sea Island	10 000	Capable of small increase but area restricted
AUSTRALIA	2 975 000	5 773 000	Good in Queensland and also in parts of other states	Favourable	Rail and River	8 500	Good	200 000	Production largely limited to available labour
INDIA	1 805 000	314 000 000	Good in many districts	Good	Rail	5 871 000	(See remarks)	—	Measures essential to improve the quality There are possibilities of growing better qualities in irrigated districts in the Punjab and Sind

TABULAR STATEMENT SHOWING APPROXIMATE ESTIMATE OF COTTON GROWN IN EMPIRE FIELDS IN THE BRITISH EMPIRE (Bales of 400 lbs.)

Year	West Africa	Uganda and Kenya	Nyasaland and the Rhodesias	Union of South Africa	Sudan	West Indies	Tanganyika Territory	Iraq	Australia	Sundries	Total
1903	750	150	—	—	—	1 000	—	—	—	—	1 900
1904	2,550	850	—	—	—	2 000	—	—	—	100	5,500
1905	4,550	2,000	—	—	—	4 000		—	—	650	11 200
1906	7,350	700	2 300	—	—	5,500		—		200	16 050
1907	11 500	2,200	2,500	—	—	6 500		—	—	300	23 000
1908	6,400	4,300	2 100	—	—	7 000				500	20,300
1909	13,000	5,400	2 800	—	—	6,400		—	—	500	28,100
1910	6 700	12,400	3 400	—	15,000	5 500	—	—	—	500	43 500
1911	6,800	20,500	5 300	—	21,000	6 500	—	—	—	700	60,800
1912	11,890	29,900	7,200	—	15,000	6 500	—	—	—	1 000	71,490
1913	16,300	27,000	7 500	100	14,000	7,000	—	—	—	900	72,800
1914	14,850	42,500	8,000	345	10,000	6 000	—	—	—	655	82 350
1915	7,600	25,500	9,000	390	24,000	5 600	—	—	—	3 110	75 200
1916	20,300	25,300	8,500	330	16,200	3 500	—	—	—	4 670	78 800
1917	11,900	24,200	6 500	380	23,000	3 000	—	—	—	3 620	72 600
1918	6,200	23,200	5,000	640	12,000	4,500	—	—	—	3 360	54,900
1919	17,500	35,100	2,200	2,000	12,300	5,500		—	—	5,000	79,600
1920	16,200	52,100	3 500	2 500	22,000	4,500	—	—	—	5 000	105,800
1921	31,500	81,800	4 600	2,500	27,700	4,500	7 600	—	1,000	4 000	165 200
1922	13,600	40,400	5 700	2,800	24,300	4 000	7,175	300	3,300	3,700	105,275
1923	19,900	86,200	6,500	6,000	28,000	5,000	11,400	1,500	9,000	6,000	179,500
1924	27,000	124 900	8,700	8,700	46,100	5,000	17,500	2,500	10,500	6 000	261,900
1925	40,200	198,300	13,100	18,800	42,700	4,900	25,200	2,500	15,000	6,000	366,700
1926	49,000	181,200	14,900	20,400	122,100	5,800	27,400	3,500	9,000	6,000	439,300
1927	25,500	133 200	5,600	10,200	158,900	5,700	22,000	1,800	6,000	6 000	374,900
1928	25,000	139,150	4 600	11 000	129 200	5 000	27,400	5,200	8,500	4 500	359 550
	414,040	1,323,450	139,500	87,085	783,500	130,400	145,675	17 300	62,300	72 965	3,156,215

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L'Oeuvre de l'Association Cotonnière Coloniale Française.

Rapport préparé pour le XIVe Congrès International Cotonnier de Barcelone.

CHAPITRE I.

L'Association Cotonnière Coloniale et le Programme Cotonnier en Afrique Occidentale Française.

L'extension de plus en plus grande prise par la production agricole en Afrique Occidentale Française (A.O.F.) a incité le Gouvernement français à homologuer les résultats déjà obtenus et à encourager les efforts faits sur place par l'administration locale et par l'initiative privée. C'est pour cette raison que le Ministre des Colonies au début de cette année se rendit en Afrique Occidentale Française effectuant à travers les territoires français une randonnée de près d'un mois.

Au cours de son voyage en A.O.F. et spécialement au Soudan, l'attention de M. Maginot, Ministre des Colonies, a été forcément attirée sur les perspectives qu' offrent pour l'avenir cotonnier de la zône nigérienne le programme et les travaux d'hydraulique entrepris par le Gouvernement général sous l'habile direction de M. l'Ingénieur Bélime. La culture du cotonnier en terrains irrigués est appelée, au fur et à mesure de son extension à procurer à nos industries métropolitaines un tonnage important d'une fibre de bonne qualité, fournissant au producteur lui-même un rendement rémunérateur.

Mais l'avenir cotonnier de l'Afrique Occidentale ne réside pas seulement dans la culture irriguée, qui n'en est qu'à ses débuts dans la colonie du Soudan Français. La production en culture sèche qui est, pour les populations indigènes, le mode traditionnel et familial usité depuis des siècles, a fait l'objet bien avant la guerre, mais surtout depuis cinq ans d'études et de travaux intéressants dans la plupart de nos territoires africains, ayant fourni dans l'ensemble des résultats satisfaisants.

L'Association Cotonnière Coloniale a largement participé depuis plus de vingt ans à la mise en œuvre du programme cotonnier colonial et n'a pas cessé d'apporter aux administrations locales le concours le plus agissant.

C'est à cette Association, " organisme de propagande et d'études fondé en 1904 avec l'appui, principalement, de l'industrie cotonnière, que revient l'honneur d'avoir cherché la première à définir et à aborder la tâche à accomplir."*

Sa première intervention avait eu pour objet la création au Dahomey de trois usines d'égrenage à Cotonou, Savalou et

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* Rapport du Syndicat général de l'industrie cotonnière (Juillet 1928).

Bohicon, qu'elle avait cédées en 1910 à la Compagnie Française du Coton Colonial.

Pendant la période anterieure à 1914 et au cours de la guerre, son effort s'était ensuite consacré à la Colonie du Haut-Sénégal-Niger qu'elle avait dotée de quatre stations d'égrenage à Kayes, Ségou, San et M'Pesoba. Puis, à la Côte d'Ivoire, elle avait mis tous ses soins à seconder les initiatives du Gouvernement en installant trois usines à Bouaké, Korhogo et Dimbokro, et en répandant de nombreuses égreneuses à bras dans l'interieur de la Colonie.

Avant l'établissement do son nouveau programme de 1924, l'ASSOCIATION COTONNIERE COLONIALE, provoquant ainsi en faveur de la culture cotonnière une impulsion des plus actives et réalisant un effort soutenu, avait envoyé ou installé en Afrique Occidentale 15 moteurs représentant une force totale de 140 h.p., 39 égreneuses dont 7 à rouleau et 32 réunissant 1.178 scies et 15 presses de force différente, répartis entre les Colonies du Sénégal, du Haut-Sénégal-Niger, de la Côte d'Ivoire et du Dahomey.

Etendant en outre son action aux essais de culture en vue de l'amélioration de la semence, elle avait créé à grands frais, avec l'aide du Gouvernement général, deux stations pour la culture irriguée à Richard-Toll au Sénégal, et aux environs de Kayes. Mais à la suite de diverses difficultés d'ordre financier ou dues à des circonstances locales, ainsi qu'a un défaut de personnel, ces essais durent être abandonnés.

Le programme cotonnier renforcé et agrandi, établi en 1924 par M. le Gouverneur général Carde, d'accord avec M. Waddington, Président de l'Association Cotonnière Coloniale, après un voyage d'étude que celui-ci fit en Afrique Occidentale, a d'abord placé la question cotonnière sur un nouveau plan administratif et industriel; administratif, en ce sens que le développement superficiel de la culture a été entrepris par des voies et moyens administratifs, en obtenant des chefs et des populations indigénes une extension de la culture du cotonnier du pays; industriel, en confiant à l'A.C.C. la construction et l'exploitation de nouvelles usines d'égrenage, de classement et de pressage du coton, afin de rendre marchande et exportable la fibre produite désormais en plus grande quantité par les cultivateurs indigènes et achetée par le commerce.

En exécution de ce programme, l'A.C.C., de 1924 à 1927, a remanié et renforcé ses anciennes usines et en a créé de nouvelles, avec le concours des colonies intéressées et une subvention provenant de la liquidation des fonds du consortium du coton, de telle sorte qu'elle s'est trouvée à la tête de 16 stations d'égrenage au Soudan, en Haute-Volta, à la Côte d'Ivoire, au Dahomey, au Togo et en Guinée. La machinerie comporte dans l'ensemble :—

20 moteurs représentant une force de 567 h.p.

38 égreneuses réunissant 2.520 scies.

17 presses.

En outre, elle a procédé à Koutiala (Soudan Française) a l'installation d'une ferme-école pourvue d'instruments aratoires et d'un matérial important qui ont été cédés ultérieurement à l'administration prenant désormais à son compte toute la partie du programme agricole.

Plaçant en effet et en même temps la question cotonnière sur un plan technique, le Gouverneur général créait en 1924 le Service général des Textiles au quel il annexait en 1926 un Service agronomique du coton à Ségou (Soudan), ayant pour mission l'étude scientifique et la recherche de nouvelles variétés de cotonniers à rendement et de qualité supérieurs, ainsi que l'étude et la vulgarisation de méthodes culturales perfectionnées destinées à augmenter le rendement à l'hectare.

Après cinq ans d'application de ce double programme on peut se rendre compte du chemin parcouru et des résultats atteints et ce fut précisément l'un des objectifs du voyage d'étude et d'inspection récemment effectué par le Directeur en Afrique Occidentale, de décembre 1928 à mars 1929, pour le compte de l'ASSOCIATION COTONNIERE COLONIALE.

Cette tournée a présenté, un intérêt particulier, car elle a été prolongée en Nigéria du Nord, oú, comme on le sait, nos amis britanniques ont accompli depuis vingt ans un effort soutenu et ont établi une situation cotonnière que nous considérions précédemment, en la comparant à la nôtre, comme placé à un niveau que nous aurions du mal à atteindre, au moins rapidement.

Sans entrer dans de longs détails, que la brièveté de cet exposé ne permet pas, nous résumerons ainsi nos constatations:—

A—Toute proportion gardée en ce qui concerne le chiffre respectif des populations, nous sommes en voie d'obtenir en Afrique Occidentale des résultats tout à fait comparables, pour la culture sèche, à ceux des Anglais en Nigéria. La variété de cotonnier américain "ALLEN," adoptée par eux en Nigéria du Nord et qui a été introduite en A.O.F. par notre Service Général des Textiles, progresse au Soudan et est appelée, sous sa direction et son contrôle technique, à remplacer de proche en proche l'ancien cotonnier indigène, dans toute la zône septentrionale qui lui est favorable.

La production de la Nigéria sera, en 1929, d'après les prévisions, de 25,000 balles pour le Nord et de 5,000 pour le Sud. La production probable de l'Afrique Occidentale est évaluée cette année à 25,000 balles, soit 5,000 à 5,500 tonnes environ.

Le plafond de la production possible en Nigéria du Nord, avec les procédés actuels, est estimé par les Anglais à 50,000 balles -ou 10,000 tonnes Nous pouvons le fixer nous mêmes pour la culture sèche en Afrique Occidentale de 10 à 12 mille tons pour la même période.

Nous possédons, d'autre part, une certaine avance pour l'utilisation agricole du bétail, des charrues et autres instruments aratoires, ainsi que pour la fumure des terres de même que pour l'adoption d'une formule appropriée de colonisation indigène par voie de métayage.

B—La production cotonnière fait des progrès indiscutables en Afrique Occidentale, notamment au Soudan, en Côte d'Ivoire et dans le territoire sous mandat du Togo. Ces progrès sont lents de par leur nature même; ils sont parfois contrariés par des circonstances passagères ou des conditions climatériques défavorables mais, dans l'ensemble, ils sont apparents et prometteurs.

Traduits par, les chiffres d'exportation depuis 1904, ils se fixent comme suit : —

1904—1 tonne 37 kilos
1905 à 1915 inclus, moyenne annuelle 148 tonnes
1916 à 1918 inclus, moyenne 716 tonnes
1924 ... ... 2,650 ,,
1925 ... ... 4,850 ,,
1926 ... ... 5,700 ,,
1927 ... ... 4,987 ,,
1928 ... ... 5,250 ,,

Ces deux dernières années on été déficitaires par suite de la crise de 1926–27 et de mauvaises conditions climateriques.

On trouve, aujourd'hui, de plus en plus, des groupements indigènes pour qui la culture du coton, destiné à la vente au commerce européen, devient habituelle et populaire. C'est le cas dans les régions de Barouéli, à Niénéble, dans les cercles de Sikasso et de Koutiala au Soudan, ainsi qu'en Côte d'Ivoire et au Togo.

C—Les variétés de cotonnier acclimatées, à développer, sont desormais bien connues; ce sont, pour la zône nord, l' "*Allen*"; pour la zône sud, le "*Barbadense*" de la Côte d'Ivoire et du Togo, le "*Peruvianum*" du Dahomey.

Il reste, comme, en Nigéria, à trouver une variété appropriée pour la zône intermédiaire.

D—Il est éminemment désirable que le Service Général des Textiles, organisme du Gouvernement Général, se décentralise, s'étende, extériorise son action en dehors du Soudan, et que s'opère le plus rapidement possible la substitution entre les deux plans sur lesquels est placée notre politique cotonnière en A.O.F. ou, plus exactement, que le second, scientifique et technique, vienne compléter le premier, administratif.

Les assises de notre politique cotonnière, le point de départ des, résultats méthodiques, certains, durables, que l'on peut escompter aujourd'hui avec une assurance croissante de succès, résident indéniablement dans le Service Général des Textiles, dans son action généralisée et étendue à toutes les colonies suivant le programme scientifique et pratique auquel ses recherches et ses travaux persévérants ont abouti.

L'ASSOCIATION COTONNIERE COLONIALE est amenée, après cinq ans d'expérience et de travaux, à orienter son programme, d'accord avec l'administration de façon à le mettre plus en concordance avec la production variable suivant les régions. C'est ainsi que son effort va s'intensifier dans l'ensemble que forment les trois colonies du Soudan, de la Haute-Volta et de la Côte d'Ivoire où ses dix stations et usines actuelles vont être complètées par de nouveaux groupes d'égrenage fixes ou mobiles dans des zônes dont la production cotonnière va en augmentant.

Les usines de l'A.C.C. dont l'organisation est aujourd'hui entièrement parachevée, représentent, ainsi que le voyage d'inspection a permis de le constater, des installations de valeur, bien entretenues et bien conduites. La machinerie, conçue pour une production annuelle de 4,000 tonnes de fibres, correspond aux besoins actuels que satisfont d'ailleurs en partie quelques usines privées. Les tarifs d'égrenage, maintenus au taux de 700 francs la tonne-fibre, constituent un sérieux encouragement pour le développement de la culture cotonnière car ils permettent l'achat du coton brut à l'indigène à un prix rémunérateur.

L'Association a d'ailleurs étudié et soumis à la haute administration de l'A.O.F. un projet de fixation de prix minima dont l'adoption, suivant une formule à déterminer, ne pourrait que servir grandement la cause de notre coton africain.

Le programme cotonnier de l'Afrique Occidentale, Togo compris, qui, depuis cinq ans, se poursuit ainsi pour, la culture sèche, avec persévérance, tant au point de vue administratif et industriel, qu'au point de vue scientifique et technique apparaît donc en bonne voie de réussite. Il peut avantageusement soutenir la comparaison, dans ses conceptions et ses résultats, avec celui que nos voisins et amis britanniques appliquent en Nigéria où ils se déclarent nettement optimistes sur l'avenir qui lui est réservé. Après un voyage de trois mois au Soudan, en Haute-Volta, au Niger, au Dahomey, au Togo et en Côte d'Ivoire et une inspection minutieuse qui nous a permis de mettre à jour et de compléter notre documentation personelle, nous ne pouvons que partager le même optimiste dans les destinées de nos territoires africains, pour de développement et l'amélioration de leur production cotonnière, en culture sèche comme en culture irriguée.

CHAPITRE II.

L'Association Cotonniere Coloniale au Maroc.

AU MAROC, la nouvelle usine de Casablanca, mise en marche pour traiter le coton de la dernière récolte, dont l'inauguration officielle le 15 décembre a été présidée par M. Steeg, résident général, est installée dans de très bonnes conditions et vient de terminer une campagne d'égrenage fort intéressante à un double point de vue.

Elle a, tout d'abord, traité 110 tonnes de coton brut et produit 35 tonnes de fibres de belle qualité, bien égrenées et bien présentées particulièrement appréciée des experts, et qui a trouvé preneur dans des conditions ayant entièrement satisfait les planteurs. Il en est résulté, et c'est ici une autre heureuse conséquence de notre intervention, que l'attention des colons du Protectorat s'est très sérieusement arrêtée sur la culture cotonnière ainsi que sur les possibilités de son développement qu'offrent certains régions du Maroc et que favorisent la création et le bon rendement de notre usine. Aussi la prochaine campagne d'ensemencement s'annonce-t-elle comme devant faire l'objet d'un effort étendu, susceptible de doubler la production de 1928-1929. A la date du 12 mars, une quinzaine de nouveaux planteurs de coton avaient demandé des graines de semences à notre usine, pour une quantité globale de près de dix tonnes.

Il est intéressant d'observer qu'au Maroc la culture cotonnière par recépage des plants conservés deux ou trois ans donne jusqu'à présent de bons résultats. On cite même des terrains qui ont porté les mêmes cotonniers pendant quatre ans et ont donné une quatrième récolte dans des conditions satisfaisantes. Les entreprises agricoles conservant ainsi leurs premières plantations et, continuant à en tirer parti avec des frais réduits, consacrent leurs nouvelles campagnes à l'accroissement des superficies ensemencées en coton.

L'intervention au Maroc de l'ASSOCIATION COTONNIERE COLONIALE, comme on le voit est donc en voie de produire des résultats très appréciables dont elle ne peut que se féliciter et qui l'encourage à y poursuivre activement son programme en plein accord avec les services techniques du Protectorat et avec le concours de sa filiale, l'ASSOCIATIN COTONNIERE MAROCAINE.

Voici d'ailleurs ci-après selon l'Office du Protectorat de la République Française au Maroc, l'état des exportation de coton marocain : —

1927	94,103 kilogs.
1928 (provisoire) ...	99,700 ,,

CHAPITRE III.

L'Association Cotonniere Coloniale en Syrie.

EN SYRIE l'action de l'ASSOCIATION COTONNIERE COLONIALE qu'avait préparée le voyage effectué en mai 1928 pa le Président, M. Waddington s'est précisée et est rapidement entrée dans le domaine de la réalisation.

Elle a pu trouver en M. Weber, qui l'y représente depuis le mois d'octobre un délégué particulièrement qualifié qui a été au préalable envoyé pendant cinq semaines aux Etats-Unis pour y compléter sa documentation personelle.

Sa mission, dans les Etats du Levant sous mandat français a d'abord consisté à prendre contact, dans celui des Alaouites, avec les Services agricoles et à s'initier aux méthodes très appropriées, qui ont été appliquées avec succès dans cet Etat pour la culture cotonnière.

L'examen des diverses questions intéressant le développement de cette culture dont l'avenir semble plein de promesses, a abouti, après un accord complet avec le Haut-Commissariat et les Gouvernements des Etats intéressés, à la création en Syrie d'un " Office du Coton " organisé et dirigé par l'ASSOCIATION COTONNIERE COLONIALE, qui lui affecte, pour 1929, une somme de 200,000 francs, dont 50,000 provenant d'une subvention que veut bin lui consentir l'Etat des Alaouites.

L' " OFFICE DU COTON " est destiné à assurer, en collaboration intime avec les Services administratifs et techniques des Etats auxquels il prête son concours, la surveillance du choix et de l'emploi des graines de semence, le contrôle des cultures, le classement des cotons, suivant un standard local établi par assimilation avec les standards internationaux, et l'apposition d'une estampille sur les balles de coton, après égrenage.

D'autre part, l'intervention de l'ASSOCIATION COTONNIERE COLONIALE ayant été sollicitée pour assurer l'égrenage des cotons produits dans le Sud de l'Etat des Alaouites, un projet d'usine à Hamidieh est actuellement à l'étude. Un second projet d'usine est également envisagé pour le centre de Hama, dans l'Etat de Syrie, mais la question est moins avancée que pour l'usine d'Hamidieh.

Enfin, l'ASSOCIATION COTONNIERE COLONIALE a comman dé aux Etats-Unis et reçu fin mars 1929, à Beyrouth, 15 tonnes de graines de semence de cotonnier du Texas de la variété " LONE STAR" qui on le sait, a été définitivement adoptée comme nouveau type de cotonnier syrien, genre américain, à la suite des initiatives et des travaux persévérants entrepris, dans l'Etats des Alaouites, par l'Association en participation pour les essais de culture du Coton en Syrie, de Mulhouse, de concert avec les services agricoles.

Sur ces 15 tonnes, qui ont été utilisées pour les ensemencements de la présente campagne, un tiers avait été commandé pour le compte du Gouvernement des Alaouites, un tiers pour l'Association alsacienne et un tiers pour l'A.C. C. qui en a fait don aux Etat pour être distribué aux planteurs

La Syrie devient donc, désormais, pour l'ASSOCIATION COTONNIERE COLONIALE, un nouveau secteur où ses efforts venant s'ajouter à ceux Précédemment accomplis pour y favoriser activement le développement de la culture cotonnière, sont appelés à trouver un champ d'opérations tres étendues, mais que l'insuffisance de ses ressources budgétaires la mettra, à son grand regret, dans l'obligation de limiter, à moins que de nouveaux concours ne lui soient apportés. Nous devons signaler, à cette occasion, l'intérêt que lui manifeste la " BANQUE DE SYRIE ET DU GRAND LIBAN " qui suit avec beaucoup d'attention l'éxécution du programme cotonnier et s'efforce de le faciliter dans la mesure du possible

Le Bulletin Economique de l'Etat des Alaouites, pour le 4 trimestre 1928, fournit à cet égard les intéressants renseignements suivants.

" Les cultures cotonnières, en sérieuse extension, ont nécessité l'agrandissement des usines d'égrenages existantes. En outre, plusieurs groupements étudient la possibilité d'installer pour 1929 de nouvelles stations d'égrenage dans l'Etat.

"Les banques officielles, les banques privées, ainsi que des particuliers ont consenti de larges avances aux agriculteurs. Quatre millions de francs, ont, à cette date, été prêtés pour la culture cotonnière de 1929.

" A part les Banques officielles, les prêteurs sont également acheteurs de la future récolte. Il n'existait l'an passé que deux groupements se livrant à ces opérations, il y en aura au moins quatre en 1929. Concurrence heureuse pour les producteurs.

" Dès maintenant, on doit signaler que les résultats obtenus avec la recolte 1928 furent suffisamment intéressants pour inciter les cultivateurs à poursuivre et à étendre leur culture cotonnière. Nous pouvons espérer les emblavements non inférieurs à 6,000 ou 6,500 hectares en 1929 contre 3,500 en 1928."

Il résulte des renseignements tout récents que les superficies ensemencées atteignent même 9,000 hectares.

CHAPITRE IV.

Le Coton dans les Autres Colonies.

La nécessité de limiter son effort immédiat dans les territoires les plus proches de la Métropole, n'a pas cependant distrait l'ASSOCIATION COTONNIERE COLONIALE de son but qui est de développer et d'étudier la culture du coton dans les Colonies française quelles qu'elles soient—C'est ainsi qu'au cours de l'année 1928 elle a envoyé en Afrique Equatoriale Française un de ses agents afin d'obtenir des renseignements sur les possibilités de la Colonie et d'orienter selon la technique moderne les planteurs de coton.

Or, un des terrains les plus favorables au développement du coton est situé dans une colonie française en A.E.F. entre le Tchad et l'Oubanghi.

Grâce à l'énergique initiative du gouverneur général Antonetti, une usine d'égrenage à vapeur avec un appareil à stériliser les semences vient d'être installée dans la région. De plus, des graines sélectionnées sont mises a la disposition des indigènes à des prix variant avec les cours mondiaux mais qui ne peuvent pas tomber toutefois au-dessous du prix minimum nécessaire pour la rémunération équitable du cultivateur.

Enfin, l'administration intervient en appelant dans la région un ingénieur agronome qui conseille les cultivateurs dans le choix des terrains et dans les soins à donner au coton.

Les derniers résultats parvenues d'Afrique Equatoriale Française étaient les suivants: —

Pour 1927 il a été expédié 141,992 kilogs et 102,249 pour 1928.

L'Indochine qui se trouve dans le centre attractif du Japon produit des quantitiés importantes qui cependant n'ont été dirigées vers la métropole que dans de très faibles proportions. Sa production a été de 2,064,000 kilogs en 1927 et de 346,000 pour les 10 premiers mois de 1928.

Madagascar elle-même qui recevait voici quelques années la visite d'un envoyé de l'ASSOCIATION COTONNIERE COLONIALE et dont les territoires se prêtent surtout à l'élevage fournissait cependant 2,480 kilogs en 1927 et 13,188 en 1928.

LA GUADELOUPE produisait 28,464 kilogs en 1927, l'OCEANIE 7,233 la même année et la NOUVELLE-CALEDONIE voyait sa production passer de 227,300 kilogs en 1927 à 425,632 kilogs en 1928.

IMPORTATION EN FRANCE

de coton brut et de déchets de coton provenant des Colonies Françaises au cours des 3 dernières années en quintaux métriques.

1926	ALGERIE	12,456
	MAROC	86
	A.O.F.	36,792
	INDOCHINE	214
	Autres Colonies	10,717
		60,265
1927	ALGERIE	12,893
	MAROC	341
	A.O.F.	32,552
	INDOCHINE	1,995
	Autres Colonies	5,751
		53,532

1928	ALGERIE	9,304
	MAROC	195
	A.O.F.	32,203
	INDOCHINE	510
	Autres Colonies	4,457
		46,669

PRODUCTION COTONNIERE DES COLONIES FRANCAISES

au cours des 2 dernières années en kilogs égrenès

	1927	1928
A.O.F.	3,326,000	3,432,000
A.E.F.	141,092	102,240
MADAGASCAR	2,480	13,188
INDOCHINE	2,064,000	346,000
ALGERIE	1,737,300	1,163,500
MAROC	94,103	90,700
NOUV. CALEDONIE	227,300	425,032
OCEANIE	7,233	-
GUADELOUPE	28,464	
TOGO	1,061,000	1,536,000

ITALY.

Societa Agricola Italo-Somala.

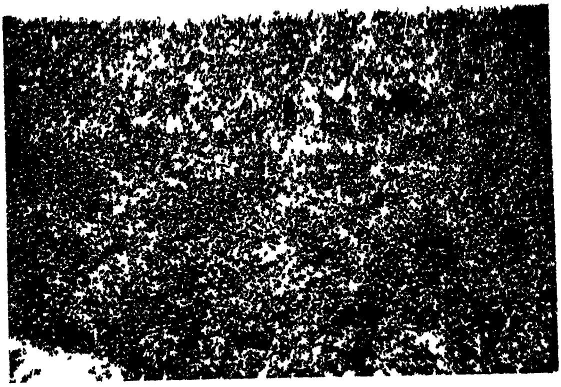
(Village Duca degli Abruzzi.)

Paper prepared for the International Cotton Congress at Barcelona, Sept. 18 to 22, 1929.

The Italian Somaliland, with the Ultra Juba, borders on the west on British Somaliland, on Ethiopia and on the British colony of Kenya; in the north, east and south-east it is bordered by the Indian Ocean. The total surface of Somaliland is about 447,000 sq. km., divided as follows :-

Italian Somaliland, north	..	sq. km.	189,000
,, ,, south	..	,,	168,000
Ultra Juba	..	,,	90,000
	Total	,,	447,000

In the following short essay, when speaking of Somaliland we shall refer mainly to South Somaliland, this being the richer and the better known part, including in its territory between the coast and duneland on the one side and the rocky pastures in the interior on the other side the two large and fertile valleys of the Juba and the Webi Shabeli, the waters of which flow from the higher regions



Very extensive plain with cotton plantation.

of South Ethiopia. It is in the region of the Shitli, midway on the Webi Shabeli, that the S.A.I.S. has done its work of improvement.

The fact that there are two large rivers, the Juba and the Webi, in South Somaliland and Ultra Juba carrying water nearly all the year round makes up very largely for the unfavourable consequences of the dry and hot climate of this region and gives it a large economic importance due to the possibilities of colonizing, making use of the water of the rivers and of the soil carried and fertilized by these rivers. Both these rivers have an immense rainproof basin in the higher southern regions of Ethiopia. The Webi Shabeli takes its waters from the southern regions of Harrar, from the mountains west of

A cotton field near a large irrigation canal

Addis-Abeba (Aruss Mountains) and east of Magalo, where it passes the water division between the rainproof basin of the Shabeli (N.E.), with a surface of about 200,000 sq. km., and the rainproof basin of the Webi, the Ganale Doria and the Dawa, which join up near Dolo, thus forming the Juba. The two rivers depend, therefore, for their water on the rains of the Harrar, Arussi and Gala regions, where it rains (about 1,000 mm. per annum) especially during two seasons of the year, namely, February/March (small rain or small Keremt) and in July/September (large rain or large Keremt), thus forming two periods during which the rivers are flowing high and two periods during which they flow very low or are even dry. The periods when they flow high are April/June and September/November, and the periods of drought are February/March (the Shabeli often runs entirely dry during this season) and July/August. During the other months the waters either rise or fall according to whether they are approaching the rainy season or the dry season or they may also have slight variations up or down. It will be seen that the amount of water carried by these two rivers varies very much when comparing the various months of the year and gives very varying figures, as the Juba is much richer and more constant in water than the Shabeli.

Provided that suitable work is done on the rivers Shabeli and Juba, both these rivers can supply a plentiful quantity of water for a few months in the year. The Shabeli during the months of May to December can supply enough water to irrigate 20,000 to 30,000 hectares. During the months of April to January the Juba can supply enough water to irrigate several hundred thousand hectares of land in its rich valley. The rivers carry rather muddy water, especially during the rainy seasons; they contain a large percentage of argillaceous mud (up to 10 per cent. of the volume), as well as very fine material containing very fertilizing and useful substances.

The bottom outlet in operation.

The first attempts at fertilizing were made about 23 years ago. Mr. Carpanetti, in 1906, planted cotton for the first time on about seven hectares in the Torda Plain, in Goscia. He experimented with Egyptian varieties (Abassi and Afifi), as well as American varieties with long fibre. The first experiment was a success, as the rains during that year were abundant enough to ripen the product without the help of irrigation.

The following year Mr. Carpanetti continued his experiments in the region of Bulo Boda (still in Goscia). The results this time were, however, poor, owing to the season having been very dry and owing to the impossibility of irrigating the cotton. Thanks to the suggestions and to the propaganda made on Somaliland by His Excellency Giacomo De Martino, Governor of the Colony, in particular in 1910 to 1916, many companies were formed at that time, and many private colonists went to Somaliland with the object of cultivating cotton and other tropical plants on the banks of the Juba and of the Webi Shabeli and in the hope of reaping high profits. These noble efforts, often ill managed, were not always crowned with success.

The waters of the river ot the surface outlet flow into the new bed made by the S.A.I.S.

In 1924 the Governor De Vecchi di Val Cismon initiated a vast programme of agricultural colonization in that district. It is not within the scope of this short essay to deal minutely and to give exact figures on the whole work done up to now in the region of the Genale by the Royal Government and by a number of audacious and tenacious colonists, in a few years of very hard and diligent work. The Colonial Government has erected in that country all the large hydraulic works and the most important canals with all the work of walling entailed therein. It has built roads, works, plants for ginning and pressing the cotton and large warehouses for the products. The land covering an immense territory, served by very large state-owned canals (about 400,000 hectares), is being granted gradually in form of concessions to private colonists in lots of 100 to 300 hectares, so that the said colonists shall carry out all the preparatory work of cultivation and the cultivation itself. The Royal Government helps concession holders by all possible means to find the necessary labour. By means of its own technical organs and with the example it offers to the colonists, in the centre of the great work of improvement, the old and now rejuvenated experimental station of the Genale very generously gives advice and sets the example how to ensure that all work of cultivation shall have the best result. After the first year of work over 1,700 hectares of land were under cultivation; of these 1,700 hectares, about 1,120 were planted with cotton and the harvest has been good and abundant.

The Royal Government has already granted many concessions affecting several thousand hectares of very fertile land.

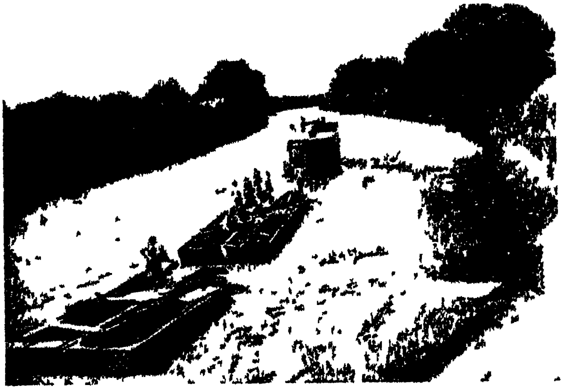
His Royal Highness **Prince Louis of Savoy, Duca degli Abruzzi**, was good enough with noble intent to create in Somaliland the great agrarian undertaking which, by the results obtained, was to prove the real economic agrarian possibilities of the colony, and it corrected, by the financial success of the undertaking, the wrong opinions and criticisms of the Somaliland colonization. By infusing trust and procuring credit to Italian capital and activity, by well-conducted colonial enterprises, our new generation was to be given fresh fields of profitable work and new works of humane and civilized progress. The aims which the Prince had set himself in his audacious undertaking were all realized; the large undertaking is now in full and prosperous development; Italian capital, having been encouraged and guaranteed by the results of the work of the Duca degli Abruzzi, has recently shown less reluctance to enter the confines of our colonies and to engage in other arduous undertakings; Italy is beginning to busy herself seriously with her African possessions, and to follow with interest the progress of the new undertakings; the Home Government and the Colonial Government are competing in promoting, financing and guiding further undertakings with a view to finally providing the mother country with precious raw materials, whilst securing adequate profits for the Colonies.

The tapping work at the beginning of the discharge canal.

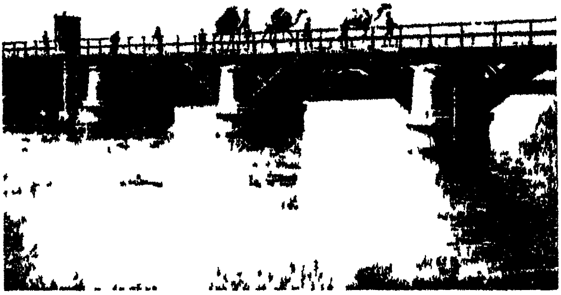
* * *

His Royal Highness Duca degli Abruzzi formed a company, with a sound financial basis, to guarantee a quick and complete installation of the vast enterprise and of the early working of same, and to provide against the dangers of crisis as may be caused by bad harvests or by temporary falls of prices of the raw materials produced. It was thus that the shares of the Societa Agricola Italo-Somali (limited company formed in Milan in November, 1920) were subscribed by large banks, large cotton manufacturers and by private persons.

The initial capital was 24 million. In 1923 and 1924 the capital was increased to 35 million lire. For this work of great improvement and of great public interest, the President and Managing Director of the S.A.I.S. was able to obtain from the National Government ample help and encouragement, the receipt of old war material at favourable prices, loans of money at low interest, the redemption of many hydraulic works, the financing of the Mogadiscio-Villaggio Duca Abruzzi Railway, exemptions from customs duties and assistance in obtaining native labour.



Towing boats of the S.A I S. going up river with their loads



Bridge built by the S A I S in the new river bed.

The Technical Agricultural Mission, presided over by His Royal Highness Duca degli Abruzzi, which went out to Somaliland in 1919 and 1920 for the preliminary studies of the undertaking, soon reached the conclusion that it was not convenient to install the undertaking on the Juba, and therefore proceeded immediately to explore and study exhaustively from the hydraulic and economic agricultural point of view the valley of the Webi Shabeli, from Havai (towards the marshy country of Balli, where the waters of the river disappear) up to and beyond Bulo Burti (towards the frontiers between our colony and Abyssinia). After very long and considered examination of the favourable and unfavourable conditions of the various territories inspected for the initiation of the improvement work, it was unanimously decided to choose definitely the region of the Shith, which, though far away from the nearest landing place (130 km. by road up to Mogadiscio) and though rendering the transport of persons and materials difficult and costly, was properly considered as the most suitable, due to its natural favourable and economic agrarian conditions.

By means of negotiations between the S.A.I.S. and the legally appointed delegates of the Shith the said company opened already in 1920 the free and continued rights of disposing of an immense territory amounting approximately to 25,000 hectares. For the time being the improvement work only affects the land conceded on the left bank of the river.

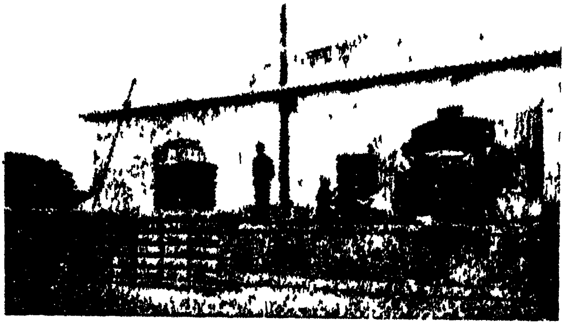
The weir plant and canalization works, which have been in operation since March, 1923, and which occasioned the moving of about 186,000 cubic metres of earth, consist of a dam, a surface outlet, a bottom outlet and of a water outlet building.

Harvesting cotton

The dam, which is built of earth with waterproof clay diaphragms and which cannot be submerged, blocks completely the river bed, the purpose of which is to bring up the water to the necessary level in order to effect the discharge.

The cultivation of cotton is certainly the most important and the one that interests agriculture in Somaliland more than any other. It affords the greatest hope for certain profits to the grower.

Due to its alluvial soil, to the possibility of irrigating the land with water from the rivers, due to the high temperature of the air and to the very scarce atmospheric precipitations Somaliland is undoubtedly one of the regions in which cotton finds the best conditions for growing and producing a good and abundant fibre. In this region it is possible to sow at two different periods of the year, namely, in April/June and in October/November. Hitherto the sowing of cotton has taken place almost exclusively in April/June. Two and a half months after sowing the cotton blooms and forms capsules, which ripen about two months later. The first branches to bloom are those nearest to the ground; they give the first, best and most abundant harvest. Then the branches in the centre and at the top produce the second and the third harvests, which are less abundant and inferior in quality to the first. If the cotton is sown in May the first and second harvests are picked in October and November, and the third in January and February. If the cotton is sown in the autumn the major part is harvested in March and the crop is completed in April.



Cotton-ginning station

The harvest is begun when many capsules are already open. The female cotton pickers are provided with a bag hung by means of a string from the neck and with a pocket. The picker puts the cotton of good quality in the bag and that of inferior quality in the pocket. This selection is made on the field in the act of harvesting. Any woman or boy can harvest in one day very varying quantities of cotton, according to the efficiency of the pickers, according to the conditions of the ripening, of the development of the plants and of the quantity of cotton borne by each plant. On an average one picker will gather 7 to 8 kgs. of seed cotton per day. The maximum is 14 to 15 kgs. and the minimum 3 to 4 kgs. In order to stimulate the harvest the operatives are paid according to results, the above-mentioned conditions being borne in mind in fixing the prices. The cotton as harvested is then taken to a factory, where it is weighed, placed on a floor and left there for two or three days to dry in the sun.

When the seed breaks with a dry crack under pressure the cotton is properly dried. The cotton, as harvested and divided into classes according to the quality, is put in bags and taken to the ginning plant, where it is divided into large lots, according to the qualities, and then ginned and pressed. 100 kgs. of Sakellaridis cotton, as it comes from the field, will give on an average 34 kgs. of fibre (including the "afrita"?) and 60 kgs. of seed. The fibre is made up in bales covered by jute cloth, weighing on an average 230 kgs. and measuring approximately 0·85 cu. m. each. The cleaned cotton seed is treated in the oil works of the S.A.I.S., and gives with one single pressing operation 13 to 15 per cent. in weight of oil and 82 per cent. of cakes, which is a favourite food for cattle. (The remainder is husk, dust and various losses.)

Twenty-three various kinds of cotton from all parts of the world have been tried. Not one of them could convince the growers that it would be more suitable than the Sakellaridis Egyptian quality grown hitherto. Experiments are still being made without interruption on the undermentioned varieties, which have shown a special adaptability to the Somaliland climate and good productive features: Egyptian Pilion and Ashmouni, American Durango and Sea Island, Australian Durango and Russel Big Boll, Agordat Red Sea variety.

This great enterprise, which has now been thoroughly established, may be considered to have been satisfactorily completed. The energetic directors of the S.A.I.S., who have created it and made it so perfect in spite of great obstacles, are to be complimented on their achievement. All honour is also due to His Royal Highness, who was the instigator and very soul of this work.

There is now nothing whatever in the way of serene and smooth future of the S.A.I.S. Being relieved of the weight of the organization of the work of establishment, lightened in the work of administration and direction, freed from so many duties and auxiliary services, having a perfect hydraulic, agricultural and industrial plant, which enables it to live and to produce without too many shocks, having organized the colonial workers, having sufficient means for all the work and the cultivated land, as well as the possibility of still extending the cultivated area, having an always increasing knowledge of the country and of the means of fighting parasites, thus guaranteeing a progressive improvement of the cultivated land, the S.A.I.S. has ensured its prosperity and final good economic result.

ITALY.

Cotton Growing on the Plain of Tessenei.

The undertaking for growing cotton on the Plain of Tessenei was unfortunately not appreciated at its true value by our cotton manufacturers; they did not afford the Colonial Government the help which the latter justly expected from them.

Taking as an example what had happened at Cassala, which borders on to the Tessenei Plain, the Government thought that their magnificent undertaking would be appreciated in a very different way.

The work into which His Excellency Gasparini had sunk his heart and on which he had spent so much energy and money was brought to an end and placed in activity, though in a different form than that originally planned.

Nobody will any longer be able to criticize the technical part of the work. It is quite enough to refer to the torrential rain of last August, when in less than three hours 83 millimetres of rain fell in Tessenei, without causing even the slightest damage to the main work. Could there be any more exacting test? The said rain did some damage to the dikes of the secondary canals, but this damage was very soon and easily remedied.

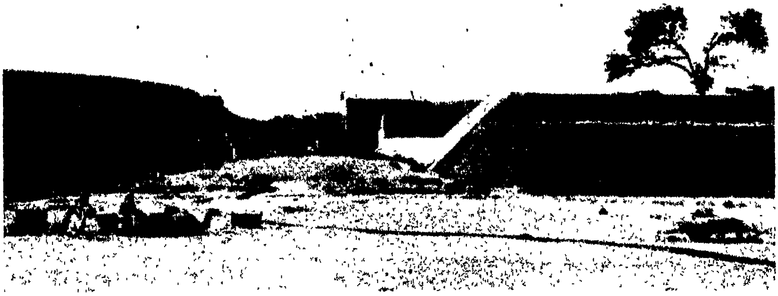
The last harvest proceeded very favourably until the month of April, but suffered after that time from violent hurricanes, alternating with strong winds.

The Tessenei Plain.

Notwithstanding that, over 1,000 quintals (about 900 bales of 110-120 kgs.) were harvested, practically all of the Sakellaridis type, there being only a small quantity of Carcabat.

The quality of the Sakellaridis was excellent, the average being fully equal to the average of the harvest of the Societá Agricola Italo-Somala Duca degli Abruzzi, whose product has now been very favourably known for years; it is indeed highly valued by some of the largest Italian spinners.

The quantity is, of course, not very bulky in itself, but neither is it negligible, bearing in mind that the purpose of the cotton is to replace the Egyptian qualities, the consumption of which is relatively limited.

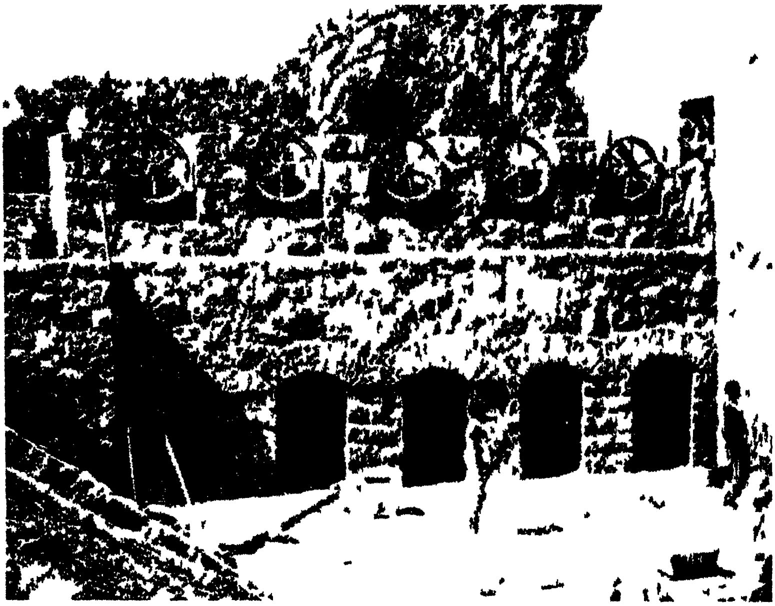


Dam (length 54m., width 3·25m.)

The question was recently discussed at Asmara whether for the next harvest one ought to continue growing the Sakellaridis kind, or whether it would be more profitable to return to the Carcabat kind of cotton, which was already acclimatized in the Colony.

Locks.

The conversation turned around considerations of commercial utility, bearing in mind that the product of Carcabat, taking an equal area, is twice as much as that of Sakellaridis, but that the difference in price between the two qualities is very considerable



Locks

It was, however, finally decided not to make any change in the kind of cotton to be grown, at least not this year, 1 500 hectares of perfectly irrigable ground will be sown

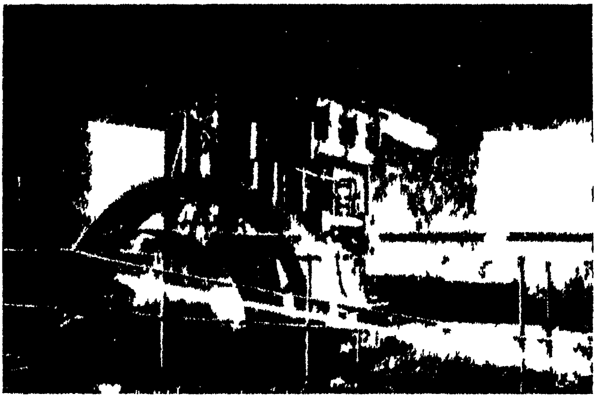
Ginning Machines

When talking about cotton growing in Eritrea, one must bear in mind that it is not only the Tessenei Plain that is suitable for cotton growing; there are other districts that are also of considerable importance

What can be foretold about the next harvest? It is very difficult to say anything. Unfortunately the agricultural districts are still menaced by the locusts.

Cotton Warehouse

One thing is certain, however, and that is if private individuals and commercial companies had done, on this side of the Soudan frontier, only half as much as was done on the other side, it would now be possible to talk about Tessenei in a more flattering manner.



One of the Engines

All undertakings have to overcome the, sometimes, very grave difficulties I mentioned in previous articles, but to be successful in overcoming them it is necessary to tackle them fully prepared and with determination.

New Italy is doing much bigger things, why not also complete this work, which is already well on the way?

Milan, 22nd October, 1928 GALIANO CIRIANI

BELGIUM.

Cotton Growing in the Belgian Congo.

PAPER prepared by the Compagnie Cotonnière Congolaise, Brussels.

The introduction of cotton growing in the Belgian Congo dates back to 1914, at which time the Government sent, on the suggestion of Mr. Leplae, the General Director of the Colonial Ministry, various missions to Africa, in order to study the cotton-growing conditions and to determine the most likely districts where cotton growing could be undertaken on a large scale. These missions had further as object to find out which was the most suitable variety for quick and thorough acclimatization in the Belgian Congo

The "Triumph" variety was selected as the most suitable to the climatic and soil conditions of the Belgian Congo. Numerous districts were found to be perfectly suitable and promised to develop cotton growing, such as Ubangi, the two Uélés, Ituri, Kuvi, Maniéma, Lomami, Kasai, Sankuru. Since then experiments undertaken in the Ruanda-Urundi districts have shown that there also cotton cultivation could be advantageously introduced. For a number of reasons, mostly of an economic kind, cultivation has, however, mainly developed in the Uélés.

Cultivation and work in connection with cotton in the Belgian Congo are regulated according to Degree of the 1st August, 1921. This law has been at various times modified; it may be said that it determines the necessary conditions for obtaining licences for the purchase of cotton and the erection of ginning factories. It specifies also the zones of activity of the cotton-growing companies and defines in the fullest detail the method of purchase (cotton markets, licences for buying, etc.).

The minimum purchase price of cotton to be paid to the native is fixed in each province by means of Ordinances. Independently of the price paid in specie, the cotton-growing companies distribute, as a means of propaganda, amongst the natives a kind of premium in the shape of tools and salt, and to the chiefs they give silver prizes.

The real propaganda is undertaken by Government agents who visit the fields and give to the natives instruction.

The attention of the Government and cotton-growing societies is particularly centred on the selection of good seed. For this purpose selection farms and seed-growing farms have been installed by the Government. These farms are at present being operated under the auspices of the Colonial Plantation Administration, whose expenses are covered by means of a cotton tax, which is at present 0.35 francs per kilo lint cotton. The cotton-growing societies have also their own seed selection farms.

The cotton-growing companies have come to the conclusion that it is in their interests to make experiments with the various kinds of cotton, in order to be able to satisfy the demands of *all* the spinners, and for this purpose they have engaged in the Colony various agricultural specialists who are studying the cultivation of the different kinds of cotton under the varying conditions of the different districts.

The fight against cotton parasites has been outlined in the Decree of the 1st August, 1921, which requires that the farmers destroy completely all vestige of the crop of the preceding year, and all spontaneously growing cotton which may have found accidentally a place in a neighbouring field must be uprooted. The same Decree prescribes the topping or even the complete destruction, on request of the Authorities, of parasitic plants, and the finishing of the ginning before the end of the season in which the cotton is grown. The importation of foreign seeds is also regulated by this Decree.

An important factor affecting the activities of the Congo cotton-growing companies has been the constitution of a Congo Cotton Committee in March, 1920, at Brussels. This Committee consists of all the existing cotton-growing companies in the Congo, without exception. It has, for its object, to suppress competition and to find out the best means for increasing the quantity and improving the quality and to supply to the Government all information which it may require on cotton growing.

The following is a statement of the existing cotton-growing companies and of those firms which undertake the cotton purchases and ginning in the Belgian Congo:

	Ginning Factories
Compagnie Cotonnière Congolaise	50
S.A. Textile Africaine	30
Nieuw Afrikansche Handels Venootschaap ...	7
Société Cotonnière du Népoko	6
Belgika	5
S.A. des Anciens Etablissements Puppa et Sabbe	3
Compagnie Cotonnière Coloniale	3
Société Commerciale Africaine	3
Compagnie de la Ruzizi	3
Magimi	2
Compagnie Cotonnière de l'Afrique Orientale	2
Total	114

The capacity of these ginning factories varies, according to the cotton, from 400 to 3,000 tons seed cotton per season.

The following is a comparative statement showing the production of lint cotton in the Belgian Congo since the introduction of cotton growing in 1916:—

Production of Congo cotton.

Year	Number of bales of 400 lbs. lint cotton	Metric tons
1916-17	22	4
1917-18	110	20
1918-19	773	140
1919-20	1,187	215
1920-21	1,850	335
1921-22	3,674	665
1922-23	5,442	1,000
1923-24	4,917	890
1924-25	8,729	1,580
1925-26	17,486	3,165
1926-27	27,000	4,887
1927-28	33,011	5,975
1928-29 estimates	36,187	6,550

As regards quality, Congo cotton is classified as follows:—

Middling 1/20th. Strict middling 14/20th. Good middling 5/20th.

The length of fibre varies from ⅞ in. to 1 in.

Cotton produced north of the Equator is somewhat brownish, whilst that south of the Equator is white.

Congo cotton can be used in spinning by itself or mixed with American cotton.

ALGERIA.

Vegetative growth of cotton was somewhat retarded in July but development in August was good; appearance of the plants at present is good and yields above previous estimates are anticipated, although probably below those of last year.

Production of ginned cotton in 1929-30 is forecasted at 29,300 centals (6,100 bales), against 29,500 (6,200) in 1928-29 and 19,600 (4,100), the average of 1923-24 to 1927-28. Percentages: 99.5 and 149.7.

ARGENTINE.

Raw cotton exports from Argentine during 1928 were as follows:—

	Tons
Germany	2,368
Belgium	1,541
Chili	1
Spain	1,626
France	1,229
Italy	521
Portugal	139
United Kingdom	10,477
Uruguay	9
	17,911

The total exports during 1927 were 9,247.

COTTON PRODUCTION IN CHINA

As compiled by the Chinese Cotton Mill Owners' Association.

(1) COTTON AREA (MOW). (6,586 mow = 1 acre)

Province		1919	1920	1921	1922	1923	1924	1925	1926	1927	1928
Hopeh ..	..	6,397,000	4,391,032	4,709,963	4,351,798	3,630,654	3,067,903	2,895,000	2,433,000	2,490,800	2,163,140
Shantung	..	3,218,000	428,330	2,333.190	3,534,707	3,677,277	2,954,385	3,099,191	3,254,550	3,172,630	3,317,210
Shansi ..	..	486,320	615,240	695,025	839,288	875,921	613,145	755,000	1,407,400	1,298,559	949,355
Honan ..	..	1,417,654	—	856,000	3,047,144	2,693,068	2,677,000	2,985,700	2,881,200	2,816,970	1,566,600
Shensi ..	..	—	1,283,650	2,405,640	1,867,200	1,642,288	1,642,288	1,316,000	1,447,030	1,442,540	1,217,650
Kiangsu	..	19,278,307	12,474,700	11,812,600	9,605,978	8,164,751	7,760,893	7,815,016	8,129,000	7,328,602	8,824,000
Chekiang	..	—	1,270,100	1,199,009	1,096,000	1,181,000	1,567,200	1.772,920	1,731,000	1,734,200	1,730,800
Anhwei	..	762,600	1,195.695	1.099,000	1,147,950	1,151,416	1,036 275	841,200	433,881	436,730	469,481
Kiangsi	..	—	398,850	256.650	361,630	659,575	689,575	714,000	541 666	597 248	770,850
Hupeh ..	..	1,478,000	6,269.700	2,549,100	7,612,900	5,848,100	6,432,910	5 927,000	5,061,000	6,292,000	7,537,300
Total	..	33,037,881	28,327,297	28,216.168	33,464,595	29,554,053	28,771 577	28,121,027	27 349,727	27,610 279	28,092,416

(2) COTTON YIELD (PICUL. 1 Picul = 133⅓ lbs.)

Province		1918	1919	1920	1921	1922	1923	1924	1925	1926	1927	1928
Hopeh ..	..	2,099,381	2,683,753	1,022,219	1,819,314	1,295,119	944,973	798 575	958,290	814,300	770 550	653,120
Shantung	..	720,787	894,558	126,070	295,077	1,005.230	1,387,666	937,224	995,603	518,279	709,755	620 413
Shansi ..	..	304,322	201,851	64,996	248,737	164,114	230,681	161 502	161,502	380,583	501,872	288,980
Honan ..	..	268,161	427,633	—	219,400	555,036	667,512	572,141	544,634	557,427	590,220	214,282
Shensi ..	..	—	355,000	293,967	429,967	476,600	461,954	467,888	772,015	370,919	358,106	84,163
Kiangsu	..	4,128,696	2,763,160	3,022,210	1,283,660	2,446,650	1,489,084	2,768,781	2,242,475	1,920,849	1,637,590	2,542,345
Chekiang	..	—	264,900	251,106	308,760	98,300	329,960	675,567	506.100	326,527	529,180	346,445
Anhwei	..	243,012	125,535	291,975	163,830	154,833	189,515	153,472	176,492	126,458	129,591	146,015
Kiangsi	..	131,250	105,000	97,860	45,325	84,623	171,537	154,406	169,846	116,190	144,451	124,322
Hupeh ..	..	2,325,170	1,207,000	1,580,000	615,150	2,029,850	1,271,760	1,119,326	1,007,394	1,112,053	1,350,793	1,591,688
Total	..	10,220,779	9,028,390	6,750,403	5,429,220	8,310,355	7,144,642	7,808,882	7,534,351	6,243,585	6,722,108	6,611,773

GREECE.

The production for 1928 is estimated by local dealers at about 35,000 equivalent to 500-pound bales, and is said to be of satisfactory colour and staple. Although the area for the 1929 crop is estimated to have increased by about 5 to 10 per cent., the estimated production is placed at the 1928 figure.

(*Foreign Crops and Markets.*)

RUSSIA.

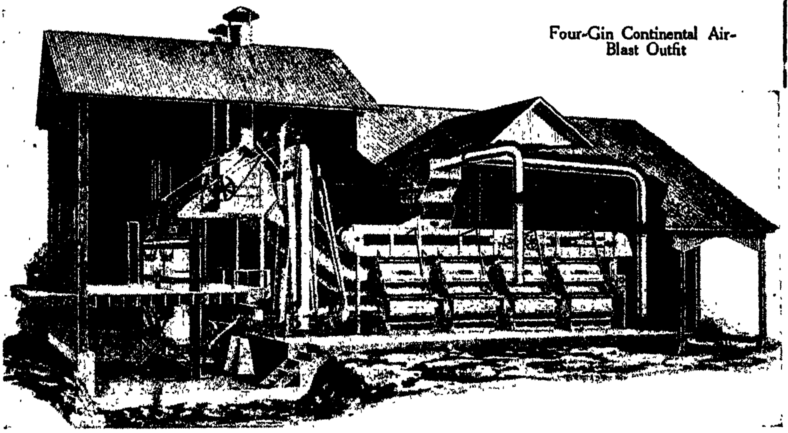
In Russia it is estimated that 2,559,000 acres were planted to cotton this year, as compared with 2,289,000 acres last year. It is estimated that 1,325,000 bales will be produced, as compared with last year's crop of 1,208,000 bales.

(*Foreign Crops and Markets.*)

SPAIN.

TAX ON RAW COTTON.

According to a recent issue of the *Gaceta de Madrid*, a Royal Order, dated 12th September, authorizes the increase of the special tax imposed on raw cotton imported into Spain, from 5 to 10 centimos per kilog. The proceeds of the tax are to cover the expenses of the Cotton Industry Control Commission established in 1926.



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BENDERS FROM ALL PARTS OF
THE COTTON BELT

Effect of American Stock Exchange Crash on Cotton.

The effect of the continued crash on the New York Stock Exchange has immediately affected speculation in cotton and other commodities. The recent fall in the price of cotton must be largely attributed to the difficulty of finding buyers for the hedges put out by the Southern farmers, for the price of 18 cents is very near to what is assumed by the American Department of Agriculture to be the average price of production for the whole Belt.

The Stock Exchange crash will have a much longer influence on cotton than is perhaps at present realized, for it is certain that the wide speculation amongst all classes of America's population and the resultant losses amongst them will have their repercussion in many industries, particularly as so many goods are being bought by American families on the instalment system. There will be immediately returned to the makers thousands of automobiles, and new business in that industry will become very difficult indeed. This means a shrinkage in the consumption of cotton, as cotton enters largely in the construction of cars (700,000 bales per annum), but a further shrinkage will result through the reduction in the construction of houses, hotels; the building industry is likewise one of the big users of cotton. Every room requires furnishing; in the construction of the walls cotton is used, etc. Practically every industry in America will be affected by the losses incurred, and the population having to practise economy in all directions will in the first instance curtail their expenditure on clothing and household furniture.

It will be assumed that speculators have learnt a lesson, and that there will be an absence of desire to enter speculation at least for a number of months. All this will influence the demand for cotton, and the 1929–30 consumption figures of U.S.A. will reflect this falling-off. The lower demand throughout Europe is being felt too. Meanwhile the American cotton-crop figure keeps creeping up, and the Indian, Egyptian and "Sundries" crops promise well.

All these events call for the utmost caution on the part of spinners in the purchase of their raw material. Cotton may be low in price now, but for the spinner who cannot sell his production it is dear at any price.

There is, of course, the reverse argument Some persons will say that Americans are inveterate gamblers, that they have burnt their fingers on the stock market, and as cotton is near the cost of production they will bounce upon the cotton market and drive up its price.

The Federal Farm Board may step in, but their activities will in the long run not alter the fact that the cotton has still to be spun. They cannot take it out of the world. Whilst the psychological effect of its intervention may tend in the first instance to increase the price, unless the Board sells the cotton to spinners, the quantity bought by the Board will act, as did the stocks held by the Egyptian Government, like a sword of Damocles. We have never heard the Co-operative Cotton Farmers' Associations complain that they could not obtain the money to handle the crop; on the contrary, they always told the spinner that they obtained their funds at as low a rate as any institution. Why, then, should there be any need for the Farm Board? Indeed, in America many regard the creation of this additional intermediary as mere "political eyewash."

On the 22nd October American spot in New York rose from 18.05 cents to 18.50 cents, due to an announcement by the Farm Board after the close of the previous night's market to the effect that the current price of cotton was too low and that measures would be taken to relieve growers of the necessity of selling their crop at too low prices. That was before the crash.

The Farm Board, being an institution of the Government, one naturally wishes to know what difference there is between a pronouncement of this sort and that which was made two years ago by a responsible official of the Department of Agriculture. In the latter case he stated that the price of cotton was too high, and this caused an enormous upset, as it affected the campaign of the bulls. Now we have the opposite, an institution under the auspices of the Government making a pronouncement that they consider the price too low and that they will take action to remedy this, thus instituting artificial interference with the laws of supply and demand and encouraging the spirit of speculation which the Federal Reserve Board was most anxious to reduce on the stock market.

Such pronouncements cause unnecessary fluctuations, and if the Board is to function satisfactorily its policy should be made known months ahead to the world at large.

The Lang system, advanced some 24 years ago by a Swiss spinner, provided minimum *and* maximum prices. Perhaps the world is now more prepared to adopt such a proposal than in those days. According to the Lang scheme, the Board would have told the world early in the season that when the price of cotton reaches, say, 18 cents they would set their machinery for the purchase of cotton into motion. The trade would then have been

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warned and the price of cotton would probably never have reached that limit. The ideal is that the Farm Board should also state, months in advance, the highest price which they will allow, say, 22 cents. That would tend to steady the price of cotton; which would not only be an advantage to the industry but also to the farmer in the long run; it is, however, pretty certain no political party in U S A. would be strong enough to fix a sound maximum price.

A. S. P.

Retrospect of the Tour through the U.S.A. Cotton Belt in 1929.

By NORMAN S. PEARSE.

Early this season there existed every prospect of an abundant crop of cotton in U.S A. The acreage originally planted under cotton was one of the highest (viz , 48,457,000 acres)– in fact only the 1926-27 acreage was higher The season in the ground was also very favourable on account of heavy winter rainfall Temperatures during the winter were, however, not severe enough to kill the weevil in large numbers; consequently there was a large survival of these pests. However, in most parts of the belt their propagation was checked by the hot and dry weather in July, August and September

The enormous acreage planted this season to cotton naturally led the trade in the early stages to expect a correspondingly large crop. When the writer arrived in the States (16th July) most cotton merchants pinned their faith to a crop of anything up to 18 million bales, but the drought in the western States, particularly in Texas, prevented such a large crop from materializing. On the issue of the August Government Crop Forecast of 15,543,000, the cotton men of the south still hoped and expected daily the breaking of the drought. When the rains did eventually arrive over Oklahoma, Arkansas, and Texas, during the first days of September, many still believed that this rain would add considerably to the crop Events have proved, however, that the rains came too late to save the burnt-up plants.

At the beginning of the season we witnessed a situation exceptional for the United States: that the "bears" outnumbered the "bulls." But this condition changed when in August the weevil scare found adherents and later on the drought developed. The "bulls" continued to drag the weevil scare into their argument in spite of the persistent drought, which renders the procreation of younger generations of weevils impossible. It is, however, undoubtedly true that some sections have suffered damage, principally the uplands of Southern Mississippi, Southern Georgia, Southern Alabama, both Carolinas, and the coastal sections of Texas.

On the issue of the September Government Report of 14,825,000, showing a decrease of 700,000 bales in the yield for Texas, opinion began to swing more to the "bull" side and, as usual, it went too far. Contrary to the general opinion held, Texas did not benefit from the September rains, most people also overlooked the point that in other States such as Arkansas, Mississippi and Alabama the September rains had not come too late. When the October report of 14,915,000 was issued this increase was regarded as bearish and the price fell.

The fact that this year the American Stock market has witnessed a phenomenal speculation of all classes of the American population has left the cotton market comparatively free from professional speculators, so that even to-day (end of October) there is an absence of buyers of southern hedges, with a consequent low level of prices.

The permanent staff of the Cotton Crop Reporting Board has not changed during the last few years, consequently the experience they have gained is reflected in the more accurate estimates issued in recent years.

It might be advisable if at the commencement of the season the Board made known, in succinct but precise manner, the methods to be used and the interpretation to be given to their figures. Many people in the cotton trade, even in America, do not understand how these reports are compiled, and are therefore unable to give the correct interpretation to the Board's estimates. The issuance of a small official explanatory pamphlet describing the system, methods used, and any alterations in the usual procedure, would be helpful to the whole cotton trade.

An account of my journey through the various States has been forwarded to each of the affiliated Associations and by most of them to the individual members. It is, therefore, hardly necessary to cover the same ground in this article.

The writer may be excused for expressing his satisfaction that the strong bearish attitude which has characterized all the reports he sent from U.S.A. has been justified by the events that have taken place since.

Prior to leaving America (21st September) the writer obtained some additional crop information, in reply to a questionnaire, from his friends all over the Cotton Belt. The following is a summary of the answers received. This is new information which might prove instructive to the buyer.

QUESTIONNAIRE

1. What is your estimate of production in bales (500 lbs) for your State?
2. If you differ from the last Government estimate for your State, please give your reasons for doing so.
3. Please state what are the average staples and grades now coming forward in your State.
4. Could you give an approximate idea of the average weight of bales and the percentage gin outturn?
5. Any other remarks.

REPLIES.

(The figures in brackets against each State are the different bale estimates for these States as issued by the Government in August, September and October of this year.)

TEXAS. (4,798,000 Aug.), (4,107,000 Sept.), (3,950,000 Oct.).

Question 1. Estimates varied between 3,900,000 and 4,300,000, with an average of 4,157,000.

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Question 2. Those who estimated below the Government September estimate of 4,107,000 gave as their reason that bollworms, weevils, and drought, and, in some places, too much rain had cut the crop still further. Those estimating higher did so expecting that the rains would benefit the yield by making larger bolls and making a small top crop.

Question 3.

Houston reported 75 per cent. Strict and Good Middling, 25 per cent. Middling, lower grades negligible but will come in later, $\frac{7}{8}$in. to $\frac{15}{16}$in., also some inch, but considerably shorter than usual; Corpus Christie reports 25 per cent. 1in. to 1$\frac{1}{16}$ins., 75 per cent. $\frac{7}{8}$in. to 1in. Dallas states average receipts were Strict Middling, $\frac{15}{16}$in., some mention of inch and longer. Since the rains early in September, Middling is more in evidence. Special staple varieties show a fine character and a hard strong staple; their tensile strength is excellent, but length disappointing.

The writer holds the opinion that the soil of the central part of Texas, owing to 50 years' continued planting of cotton, has fallen off markedly and the production of good qualities has ceased; as no chemical manure has been found suitable for this black soil, it is to be feared that we shall not get again from Texas the old character on which the European industry relied for so long. In short, the soil is exhausted. Another reason for the falling off in the rest of Texas is the planting of the short half-and-half variety.

Question 4. Replies vary between 531 lbs. to 515 lbs., average 524 lbs. Gin outturn 32 per cent., poor to normal.

Question 5. Benefit from recent rains to crop will depend somewhat on weather conditions for next 60 days. Late frost and good picking weather will add materially to our crop. Texas is expected to produce a much larger proportion of untenderable cotton this year than usual.

LOUISIANA (715,000 Aug.), (791,000 Sept.), (820,000 Oct.).

Question 1. Estimates varied between 775,000 and 825,000, with an average of 806,000.

Question 2. General opinion was that the Government had underestimated and that the damage by drought and weevil was overestimated.

Question 3. Average Middling and Strict Middling and 1$\frac{1}{16}$ins. to 1$\frac{1}{8}$ins., although New Orleans reports mostly $\frac{7}{8}$in.

The writer believes that this State and Alabama will grow better staple in future years.

Question 4. 500 to 510 lbs., average 506 lbs., and 34 per cent. gin outturn.

ALABAMA (1,317,000 Aug.), (1,216,000 Sept.), (1,300,000 Oct.)

Question 1. Estimated between 1,100,000 and 1,300,000, average of returns 1,216,000.

Question 3. Grade average Middling $\frac{7}{8}$in. to $\frac{15}{16}$in., some inch, better than usual.

Question 4. 510 to 520 lbs. per bale; gin outturn 35 to 37 per cent., which is higher than usual.

OKLAHOMA (1,275,000 Aug), (1,295,000 Sept), (1,225,000 Oct)

Question 1 Various estimates between 1,150,000 to 1,450,000 with an average of 1,360,000 bales

Question 2 Good rains over whole State increased the yield but one reporter points out that the bolls are much smaller than usual

Question 3 ⅞ in , $\frac{15}{16}$ in to 1 in , majority $\frac{15}{16}$ in Strict Middling

Question 4 Average bale weights 517 lbs , gin outturn 31 per cent , poor

ARKANSAS (1,449,000 Aug), (1,391,000 Sept), (1,430,000 Oct)

Question 1 Various estimates between 1,300,000 to 1,500,000, average 1,391,000, which figure was given by the Government in September

Question 2 Rains benefited the crop in September, but other reports (Fort Smith) mention the activity of weevils as likely to cause more damage

Question 3 September rains will make Middling and Strict Middling, though at present Middling to Good Middling Staple one-third, ⅞ in , one-third, $\frac{15}{16}$ in and 1 in , one-third, 1 $\frac{1}{16}$ ins to 1 $\frac{3}{16}$ ins

Question 4 Little Rock and Pine Bluff report very heavy bales, 530 to 550 lbs , while the weight of bales round Fort Smith is lower, 510 to 525 lbs , the average for the State 527 lbs , Gin outturn varies from 31 per cent to 35 per cent , according to the length of staple

Question 5 Basis going higher every day Cotton making more fruit in some districts

MISSISSIPPI (1,921,000 Aug), (1,669,000 Sept), (1,650,000 Oct)

Question 1 Estimates ranged between 1,650,000 and 1,850,000 and gave an average of 1,719,000

Question 2 Decrease due to heavy shedding and small size of bolls Other gentlemen stated that the rains had been beneficial

Question 3 Clarkesdale reports Grades have been high, but since the September rains, off colours, Strict Lows to Middling have been prominent One reporter in Memphis states Staple had improved very much this season, due to better seed and favourable weather Colour good Average Middling and Strict Middling 1$\frac{1}{16}$ins in Delta In the uplands Strict Middling 1 in

Question 4 Bale weights run between 500 and 525 lbs , with an average 513 lbs Gin outturn below normal in the Delta and high (36 per cent) in uplands

Question 5 Estimates of the Delta crop vary between 750,000 to 850,000

GEORGIA (1,182,000 Aug), (1,193,000 Sept), (1,300,000 Oct)

Question 1 Reports ranged between a minimum of 1,220,000 and a maximum of 1,300,000, with an average of 1,254,000

Question 2 Most reports indicated that the Government had underestimated this State Showers in September should fill the bolls, but may increase weevil

Question 3 Atlanta reported 50 per cent Middling, 10 per cent Strict Middling, balance Strict Low Middling and Low Middling Staple, 10 per cent ¾in , 60 per cent ⅞in , 20 per cent $\frac{15}{16}$in and 10 per cent of 1 in , whereas Savannah informed me the major portion of arrivals are $\frac{15}{16}$in excellent character, no lows

Question 4 Replies showed weights between 485 lbs and 510 lbs, averaging 503 lbs to the bale Gin outturn between 35¼ per cent and 37½ per cent

Question 5 Western shippers coming into Georgia for their cotton and running the basis up

SOUTH CAROLINA (900,000 Aug), (1,014,000 Sept), (860,000 Oct)

Question 1 Estimates received came between 875,000 and 950,000, with an average of 918,000

Question 2 Weevil damage was stated to be heavier than anticipated

Question 3 Little movement had taken place, but arrivals were Middling to Strict Middling and the Hartsville staple was running 1⅛ins to 1$\frac{3}{16}$ins

Question 5 Season had been too cool and rainy

NORTH CAROLINA (787,000 Aug) (912,000 Sept) (835,000 Oct)

Question 1 Reports received ranged between 850,000 to 1,000,000, with an average of 922,000

Question 2 Weevil damage greater than estimated for by the Government

Question 3 Little movement, receipts so far averaged Middling to Strict Middling in to 1in

TENNESSEE (408,000 Aug) (4[illegible] Sept), (475,000 Oct)

Question 1 Estimates varied from 400,000 to 495,000, with average of 470,000

Question 2 Cotton was not moving in mid September, but reports showed that the plant was still making progress

Common Interests of Growers and Spinners in Cotton Industry.

By C O MOSER, President-General Manager, American Cotton Growers' Exchange, Dallas, Texas, before the 14th Congress of the International Federation of Master Cotton Spinners' and Manufacturers' Associations, at Barcelona, Spain, September 19th, 1929

Marketing of raw material consists of every transaction through which it must pass between the producer and the consumer, namely Processing or preparation for marketing, assembling, grading, warehousing, insuring, transporting, financing and merchandising The simple test of the relative merits of any system of marketing depends upon the relative efficiency and service with which it performs the marketing functions for the producer and the consumer The *motif* or purpose of the Cotton Co-operatives is to give maximum service to the industry by performing every marketing function with greatest economy, efficiency and satisfaction to all concerned Shortening the route between the producer and the consumer, eliminating waste, and elevating the standard of business ethics in the trade are only a part of the programme of the Cotton Co-operatives Co operative Marketing is simply a business set-up that may be applied to the marketing of farm products through which the industry as a whole may make available to themselves the successful methods and experiences of big business, and offers to the trade the advantages of large-scale operations with its resultant influence for price stabilization, efficiency and economy. The growth or decay, success or failure of co-operative marketing is simply whether the Co-operatives are able to do the task of marketing in a better way than private handlers. There is nothing mysterious or accidental about the outcome.

The possibilities for service to the industry lie largely in the application of the efficiencies and economies resulting from large-scale operations, adequate finances, necessary facilities, world-wide outlets, competent man-power. It must satisfactorily serve both producer and consumer if it may long serve either.

Dismissing, therefore, without further reference, any thought of conducting co-operative marketing on any basis other than that of an economic service to the industry, of which the producer is an important part, and through which service the consumer may benefit along with the producer, let us proceed to analyse the attitude with which the Co-operatives in the cotton trade approach their marketing problems. Upon making a favourable record of service must depend the right of the Co-operatives to live and prosper, and, conversely, if they do not fulfil their legitimate functions to the trade in a manner acceptable to them and the growers, they will deserve to fail.

In all of the essential phases of the cotton industry there is a complete mutuality of genuine interest between the cotton grower and the spinner. Stabilization of price at a level sufficiently high to ensure continuous profitable production, but not so high as to encourage overproduction; quality production commensurate with the highest money return per acre; good ginning and other processing service at a fair cost; economical transportation; low cost storage and insurance; efficient financing, and modern merchandising service, are the essential points of mutual interest between the grower and the spinner. Let us see how these considerations may best be served and how co-operative marketing may best promote the common welfare of the producer and the consumer.

SUPERIOR QUALITY OF PRODUCT.

Producing a superior quality product is the first step in any successful industry. It adds materially to the value of the product without correspondingly increasing its cost of production, but if the production of a superior quality is to be encouraged, then it must reflect itself in increased money returns to the growers, otherwise they will naturally follow the lines of least resistance.

It is well known to all informed men in the cotton trade that the system of local cotton buying discourages quality production by buying on the basis of the average quality known to be produced in the community. Such a practice results in a constantly lowering of quality of production, as those who produce below the average in quality obtain more money for their cotton than it is worth, while those who produce above the average quality obtain less than its value.

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The Co-operatives, contrary to this method, employ their own expert classers, assemble the cotton into pools according to its commercial value, and return to each member the full benefit of the consumer price obtained according to the quality which each member produces.

Thus, it is evident, both as a matter of logical expectation and actual experience, that the private system of buying cotton on the street discourages the improvement of quality production, while the co-operative system results in the encouragement of that essential matter to the industry. Certainly to this extent, the interest of the producer and the consumer are identical, while apparently the interest of the speculative buyer conflicts with both the interest of the producer and the consumer.

PROCESSING

There are two essential points involved in the processing of cotton, namely, quality of ginning and its cost. The spinner is especially interested in the first particular—that is the quality of the ginning, as nothing is more disagreeable to a cotton manufacturer than the experience of attempting to spin gin-cut staple. In addition to there being a great waste, the yarn is uneven and deficient in tensile strength. Surveys which have been made by governmental authorities have reported enormous waste from this cause—a waste that is chargeable to either inadequate ginning facilities or the improper operation of the same. The loss from gin-cut cotton is perhaps equally divided between the consumer and the producer, as it reflects itself to the consumer in the manner indicated, and to the producer in lower value of his cotton.

Excessive ginning cost is simply a part of the waste in distribution. That is, it is an unnecessary cost which must be paid by the producer and consumer. The fact that the costs of distribution have increased materially without protest by those who have privately carried on the marketing functions for the growers in the past would indicate that they realize that they have no particular concern in lowering such costs. These costs include processing, transportation, warehousing and insurance. In fact, all of the points where the cotton industry touches other lines of business and where all merchants are on an equality, so far as marketing costs are concerned, no effort has been made of consequence to lower such costs, but, on the contrary, there is ample evidence that frequently those who have owned and controlled the facilities for marketing and distribution have stood together in an attempt to continue the high cost of distribution when an effort has been made by the organized growers and spinners to reduce those costs.

In the solution of the problems of good and economical ginning, a number of the Co-operatives have found it necessary to engage in the ginning business, and to the extent that this has been done in the past they have solved both of the difficulties referred to. About 50 modern gins now in operation are owned by the Cotton Co-operatives.

Again the interests of the cotton grower and spinner in this phase of the industry appear to be identical.

ECONOMICAL TRANSPORTATION.

One of the most flagrant and inexcusable abuses in our present system of distribution has been the exorbitant and excessive freight rates which cotton has been compelled to bear as compared with other commodities.

After a year of preliminary study by the traffic experts of the Cotton Co-operatives and two years of work in compiling and presenting the inequities and the inequalities in the existing freight rates on cotton, perhaps the most important case affecting any agricultural commodity in the United States is now before the Interstate Commerce Commission for final hearing. A substantial reduction in cotton rates is most likely to result. If there was ever an example of the complete disregard for the interest of the producer and consumer by the cotton trade in general, or their inability as such to deal effectively with the question, such a situation presents itself in the status of freight rates as applied to cotton. In some instances cotton is compelled to pay from two to eight times as much in freight rates as other commodities hauled by the same railroads from the same points of origin to the same points of destination.

Time and space will not permit going into detail in this regard. Suffice it simply to say that the situation with reference to cotton fully illustrates the fact that the industries which are so constituted will continue to shift the unequal burden of maintaining our present transportation system upon the shoulders of the farmers who neglect or otherwise fail to protect their interest. Those who privately conduct marketing operations for agricultural commodities have no interest and no incentive for entering into expensive litigation looking to the adjustment of freight rates on a fair and equitable basis. Their chief interest is to see that one section of the country or one commercial centre is not more favourably treated by the railroads than another. In the past, litigation affecting cotton freight rates has been exclusively that of the interest of one city as against another city for advantageous concentration privileges, and in no instance has there been an effort made to reduce the entire rate level in order that it may compare favourably with the rates on other commodities carried by the railroads.

Here again the interests of the producer and the consumer are identical in looking to the establishment of a freight rate affecting the cotton industry in line with that paid by the other essential industries of the nation.

WAREHOUSING AND INSURANCE.

Carrying cotton from the harvest period to the time when needed by the cotton manufacturers necessarily involves a cost which must be borne by the industry. The Federal Trade Commission, in its recent investigation of the cotton industry, reported that approximately 88 per cent. of the cotton grown in the United States was produced under the crop mortgage, and therefore must be forced on to the market at the will of those who provide production credit. This is usually during the harvesting period.

The disposition of the cotton mills in recent years, both at home and abroad, to buy from hand to mouth only aggravates the problem of carrying charges.

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With only few exceptions cotton warehouses have been built more from the standpoint of economical construction costs than they have from economical operating and low insurance costs. The result is that the cost of warehousing and insurance, considered together, represents one of the most glaring examples of the waste and inefficiency with which the private cotton business is conducted.

The Cotton Co-operatives, recognizing this fact, and realizing that this waste is carried on without the general knowledge of the growers, and sometimes of the spinners, but with none the less fact that it is at their expense, have endeavoured to correct this waste so far as their own business is concerned. The saving as a result of concentrating in the most modernly constructed and strategically located warehouses represents annually millions of dollars of economies in distribution.

The item of insurance alone is of great importance. Farmers and spinners have not generally realized that every bale of cotton destroyed by fire is done so at their expense, as the fire insurance companies' losses each year are reflected in the premium rates on cotton the following year.

The Cotton Co-operatives, therefore, early in their experience, realizing that unnecessary fire loss is an economic waste, endeavoured to eliminate this waste in every practical way. The result has been that since we have adopted the policy of concentrating in modern warehouses our fire loss has been negligible, with the result that the insurance rates on our cotton in these warehouses have likewise been reduced to a minimum, in fact to an amount so small that it is almost negligible as compared with the rates paid during the first year of our experience. The difference is that the rates on our best warehouses are only about 10 to 20 per cent. of the less desirable structures generally used by the cotton trade.

FINANCING.

The cotton crop represents huge sums of money values, and large financial facilities are required in financing the crop movement. It has been properly said that where co-operation touches finance the result is a miracle. Individually, the cotton farmer pays a higher rate of interest perhaps than the producers of any other basic commodity, agricultural or industrial. The production of cotton is an expensive and hazardous undertaking. Generally speaking, cotton farmers are people in relatively poor financial circumstances, yet collectively they are able to finance their marketing operations at the lowest rates of interest and the most favourable terms accorded the oldest and best established business concerns or corporations of the country. It is no uncommon thing for a co-operative, having thousands of farmer members, to borrow money from local banks, or banks in the large financial centres at a lower rate of interest than the directors of the same banks, who may be in the cotton business. This is simply because the relative risk and security are such as to make the Co-operative the preferable customer.

The Cotton Co-operatives have borrowed as much as $87,000,000 in a single year, and, without exception, there has never been a time when any commercial paper of a cotton co-operative has been a single day past due, or when the security of the lending bank was in any way endangered.

The cost of financing the acquisition and the carrying of cotton of the Co-operatives clearly demonstrates the ability of a farmers' organization to perform this service most economically and efficiently.

MERCHANDISING.

Modern merchandising has for its purpose the movement of commodities in the most direct line from the producer to the consumer, eliminating all unnecessary waste, handling costs, unnecessary risks, and with the greatest practicable dispatch. In point of business ethics the modern merchandiser endeavours to conduct his business on the highest plane of business integrity and regard for customer interest. Emphasis is placed on service and customer satisfaction. Truth in advertising and honest representation are simply the avenues of approach which the seller uses in reaching the buyer.

The Cotton Co-operatives invite the most scrutinizing investigation of their merchandising methods, according to the most modern and approved conception of merchandising practices.

We have no disposition to reflect upon the integrity or high character of men engaged in private cotton business. Among these men are numbered some of our most intimate and highly regarded personal and business friends, but with approximately 40,000 men thus engaged, it is only too well known in the industry that many so-called cotton merchants do not measure up to the high standard of requirements of the modern merchant. The cotton industry is an old industry. In some instances three and four generations in the same family are carrying on the work which their forefathers began. In many instances the methods of doing business have been handed down from one generation to another with relatively little improvement. A few generations ago the principle "let the buyer beware" was more or less generally practised. "Let the seller beware" is still fairly generally applied in the purchase of cotton from the local farmers.

The necessities growing out of the practice of forward selling of a crop easily influenced in quality by weather and insects beyond the control of the operator lend themselves peculiarly to a continuation of "let the buyer beware" policy. Substituting as nearly as may be obtainable cotton of a quality or description equal to that contained in the confirmation of sale is unavoidably the prevailing practice. This frequently gives rise to losses on the part of either the buyer or the seller, frequently both, together with disappointment and dissatisfaction on the part of the purchaser. Add to this unavoidable circumstance the fact that substituting cotton of inferior quality frequently provides a profit incentive to the seller, and you have a fairly good picture of the causes which lead to much grief among cotton manufacturers. Allowances for claims and adjustments of various kinds are only an effort to adjust unsatisfactory relationship between the buyer and the seller, but is no substitution for the complete satisfaction which results to the manufacturer when he receives the exact grade, staple and character of cotton required to produce the particular strength and

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fineness of yarn desired. There has been so much complaint, dissatisfaction and loss to both the seller and the buyer in recent years due to conditions affecting the size and quality of the crop, over which neither had control, and the subsequent market fluctuation, on the one hand, and inadequate financial responsibility on the other, that the small inadequately financed concerns are having increasing difficulty in finding outlets directly to the mills. The result is that in all probability the time is rapidly approaching when the great business of distributing cotton will be carried on by a relatively few large and powerful concerns, among which will be the Cotton Co-operatives.

There is a natural tendency towards direct business relations between the producer and the consumer in every industry, and the cotton industry is no exception. Everywhere, at home and abroad, there is as much willingness evidenced by the cotton manufacturers to deal with the growers, through their Co-operatives, as there is of the Co-operatives to seek the business of manufacturers. This tendency is only the outgrowth of the mutually profitable and satisfactory business relations and experience which they have carried on together through the years. The Cotton Co-operatives endeavour to measure up completely and fully to the specifications of the modern merchant. First, they eliminate every possible waste in merchandising—that is, country damage, city crop, cross-hauls, and the use of expensive warehousing and insurance facilities. Similarly, the cost of assembling is reduced to a minimum, as is the cost of grading and classing.

ASSEMBLING.

Immediately upon arrival at the point of concentration the co-operative cotton is classed into even-running lots, and handled in such a way that we know at all times the quantity of every description of cotton in our warehouses. We avoid the losses and risks assumed by private merchants when they sell cotton in advance of its production; and while we miss some of the early forward business we have the satisfaction, which our customers enjoy with us, of knowing that when we sell a certain quantity of cotton for immediate or forward delivery the cotton is actually in our possession and ready for delivery on a moment's notice.

Through the adjustment of our legal difficulties, refinements in our contracts with our members, and our experience in observing the needs and desires of our customers, we have learned how to adjust the business of the Co-operatives to meet the customary requirements of the mills. Of course, this is done at all times with the full protection of the interest of both our members and our customers.

The financial responsibility of the Co-operatives is generally known and unquestioned. We miss sales now and then on account of being undersold; but more than 200 of the principal cotton manufacturers of America are buying as large a portion of their requirements from the Cotton Co-operatives as we are in a position to supply. We practise the principle of satisfying the customer, and in doing so frequently meet demands which are unusual and beyond the terms of the sale. We work in every practicable way towards assisting the manufacturer in ascertaining the type of cotton needed for his particular quality of yarn or fabric.

The American Cotton Growers' Exchange, comprising all of the short-staple Co-operatives in every cotton-producing State from California to North Carolina, is in a position to supply any growth, quality or description of cotton grown in America.

We endeavour to get the point of view of our customer, and assist him in making a success of his business. We seldom lose a customer when he once experiences the pleasant and satisfactory relations of direct business with the Co-operatives. We make it clearly and definitely understood, however, that where these relations cannot be carried on pleasantly, we prefer to yield the business to a competitor, and in more than one instance we have instructed our sales organization to discontinue calling upon a customer who is unreasonable in his demands, or who otherwise cannot be pleased.

Co-operative merchandising of cotton is an established institution in America—it will continue to thrive and grow as long as existing policies are continued, because the policies of the Cotton Co-operatives are sound, progressive and mutually advantageous to grower and consumer. Under our present set-up we have all the flexibility of operation enjoyed by private concerns, and, in addition, have all the advantages enjoyed by the Co-operatives, together with virtually unlimited financial backing and the moral and interested co-operation and support of the Government. With these substantial assets and advantages, we are confident of the continued growth and prosperity of the Co-operatives in the future, and are ready to meet the most rigid test of efficiency according to any recognized standard based on merit and service.

AGRICULTURAL MARKETING ACT AND COTTON CO-OPERATIVES.

The operating policies which have characterized the Cotton Co-operatives in the past will be continued in the future.

Much has been written regarding the attitude of the American Government with respect to what is publicly known as Farm Relief. It should be kept in mind that the Agricultural Marketing Act recently passed by Congress and approved by President Hoover does not interfere with the internal operating policies of the Co-operatives, but, on the contrary, purposes to give these large-scale commodity associations Government co-operation and financial support. Otherwise stated, this legislation forms what might be termed a partnership with the farmers through their own Co-operative Associations in carrying out the following declared purposes:—

(1) To minimize speculation.

(2) To prevent inefficient and wasteful methods of distribution.

(3) To encourage the organization of producers into effective associations or corporations under their own control for greater unity of effort in marketing and by promoting the establishment and financing of a farm marketing system of producer-owned and producer-controlled Co-operative Associations and other agencies.

(4) To aid in preventing and controlling surpluses in any agricultural commodity, through orderly production and distribution, so as to maintain advantageous domestic

markets and prevent such surpluses from causing undue and excessive fluctuations or depressions in prices for the commodity.

It will thus be seen that the Agricultural Marketing Act of 1929 is simply a Co-operative Marketing Bill, which has for its purposes taking over as nearly as practicable the distribution of the chief agricultural commodities of the country.

A fund of $500,000,000 has been provided for the purpose of price stabilization due to seasonal surpluses beyond the control of the producers, and for financing the acquisition of physical facilities, etc. It has long been the view of the American farmers and business men that the strong arm of the Government should be used to prevent a bountiful production from bringing bankruptcy and distress to not only the farmers of the United States, but also to those who provide production credit to them. An All-good Providence never intended that, as result of the intelligence and industry of millions of farmers and the co-operation of favourable rainfall and sunshine, the producers and their supporters and friends should be thus financially ruined.

The new law provides various means for encouraging farmers to become members of the Co-operatives, and for assisting the Co-operatives in discharging their obligations of responsible service to the farmers and the trade.

In normal times it provides for insurance against a decline in price for the members of the Co-operatives, and in times of over-production provides capital for stabilization corporations to be organized by the Co-operatives to take off the market the production in excess of the world's needs. It is hoped that by this means the price may be stabilized in the interest of every legitimate factor in the cotton trade. No attempt will be made to artificially raise prices under normal conditions. At the same time the action of the stabilization corporations in acquiring unneeded portions of the supply at fixed prices is expected to prevent a temporary collapse of price, such as prevailed in 1926 and other years of unusually bountiful harvest.

There is nothing to be feared from the operations of the Federal Farm Board. It should be as helpful to the trade who desire stable prices as it is to the farmers. Both the Board and the Co-operatives are fully cognizant of the danger of price-control and neither favours prices so high as to unduly encourage cotton production in other countries, or overproduction in this country. As cotton acreage follows price, we believe a stable price will tend to bring about more uniform acreage. The purpose simply is to flatten out the price curve, and to do so with benefit alike to all legitimate phases of the cotton industry.

With the American Government as a partner with the American Co-operatives in the financing and other phases of their operating policies, we firmly believe that the Cotton Co-operatives will be in a better position in the future to render a larger and finer service to the cotton industry than they have been able to do heretofore, when they were compelled to depend upon their own resourcefulness and resources in conducting their business.

NEW YORK COTTON EXCHANGE STATISTICAL SERVICE.

The New York Cotton Exchange recently announced that it had acquired the Garside Cotton Service, with the exception of the Garside Cotton Crop Report, and has engaged Alston H. Garside, Director of the Service, in the capacity of Economist of the Exchange, effective as of October 1st.

Trade and statistical reports will be prepared under the personal direction of Mr. Garside and held in confidence by him until they are distributed by mail, telegraph and cable, so as to reach all recipients at as nearly as possible the same time.

CLASSIFICATION OF CARRY-OVER OF COTTON IN U.S.A., AUGUST 1st, 1929.

(According to the Official Cotton Standards of the United States.)

	1929		1928	
	Bales	Per cent.	Bales	Per cent.
Total carry-over (as reported by the Bureau of the Census)	2,313,000	100·0	2,531,582	100·0
Total American Upland	2,123,700	91·8	2,415,208	95·4
Total American-Egyptian	7,200	0·3	5,905	0·2
Total Foreign Grown	182,100	7·9	110,469	4·4
Grades (American Upland) :				
Middling and Better White	1,197,900	56·5	1,688,909	69·9
Strict Low and Low Middling	480,400	22·6	408,074	16·9
Below Low Middling	128,000	6·0	53,557	2·2
Spotted and Yellow-tinged	237,800	11·2	214,804	8·9
Grey, Light Yellow-stained, Yellow-stained, Blue-stained	2,800	0·1	6,347	0·3

	1929	
Staple (American Upland) :—	Bales	Per cent.
Under $\frac{7}{8}$ in.	155,200	7·3
$\frac{7}{8}$ in. and $\frac{29}{32}$ in.	651,500	30·7
$\frac{15}{16}$ in. and $\frac{31}{32}$ in.	397,500	18·7
1 in. and $1\frac{1}{32}$ in.	395,200	18·6
$1\frac{1}{16}$ in. and $1\frac{3}{32}$ in.	221,300	10·4
$1\frac{1}{8}$ in. and longer	303,000	14·3

Tenderability on Section 5 Futures Contracts (American Upland) :—

	1929		1928	
	Bales	Per cent.	Bales	Per cent.
Total Tenderable	1,748,400	82·3	2,193,758	90·8
Tenderable $\frac{7}{8}$ in. to $1\frac{1}{32}$ in. inc.	1,251,600	58·9	1,456,683	60·3
Tenderable over $1\frac{1}{32}$ in.	496,800	23·4	737,075	30·5
Total Untenderable	375,300	17·7	221,450	9·2
Untenderable in Grade	220,100	10·4	133,802	5·6
Untenderable in Staple	74,600	3·5	51,719	2·1
Untenderable in both Grade and Staple	80,600	3·8	35,929	1·5

On August 1, according to the Department of Agriculture, there were in storage and consuming establishments 2,312,974 bales of cotton. These stocks included a few thousand bales of the 1929 crop, 7,200 bales of American Egyptian, and 12,100 bales of foreign growth. Only 56.5 per cent. of the American upland carry-over is white in colour and middling or better. Last year the carry-over contained 69.9 per cent. white in colour and middling or better.

Nearly 18 per cent. of all carry-over of American cotton on August 1 was untenderable on contract. A year ago the percentage of untenderable cotton in a larger carry-over was only 9.2.

GOVERNMENT CROP ESTIMATE AS OF NOV. 1, 1929.

The Crop Reporting Board, Washington, on the 8th November, issued the following estimate, which indicates a probable production of 15,009,000 bales, exclusive of linters. This compares with 14,915,000 bales estimated in the report issued a month ago, and the actual crops of 14,478,000 bales and 12,955,000 bales for the two previous seasons. The average yield per acre as at November 1 is estimated at 154.1 lbs., against 153.2 lbs. in the previous report and 150.6 lbs. in the corresponding report last year.

The details show that the Bureau made no change in their previous estimate of yields in Texas, Oklahoma and Mississippi, but reductions were made in the North and South Carolina figures. These decreases were more than offset by increases in Georgia, Tennessee, Alabama, Louisiana and Arkansas.

The growth in Lower California, which is not included in the United States total, is estimated at 75,000 bales, against 80,000 bales last year.

The following table gives details of productions with comparisons (in thousands of bales):—

	1929.		1928.	1927.
	Nov. 1.	Oct. 1.	Crop.	Crop.
Virginia	44	45	44	31
North Carolina	760	835	836	861
South Carolina	850	860	726	730
Georgia	1,340	1,300	1,030	1,100
Florida	30	30	19	17
Missouri	210	210	147	115
Tennessee	510	475	428	359
Alabama	1,335	1,300	1,109	1,191
Mississippi	1,950	1,950	1,475	1,355
Louisiana	830	820	691	548
Texas	3,950	3,950	5,106	4,352
Oklahoma	1,225	1,225	1,205	1,037
Arkansas	1,490	1,430	1,246	1,000
New Mexico	86	84	88	70
Arizona	157	157	149	91
California	232	232	172	91
Other States	10	11	7	7
Total	15,009	14,915	14,478	12,955

BUREAU COMMENTS.

The Washington Department of Agriculture, in a supplemental statement, comments on its crop estimate, stating that the report shows a number of changes by States, with decreases in Virginia and North and South Carolina more than offset by increases in Georgia, Alabama, Tennessee, Louisiana and Arkansas. Further damage by weevil-punctured bolls became apparent during the month in North and South Carolina, Virginia and elsewhere, but the weather generally favoured the maturing and picking of the crop, and the loss from frost appears unimportant.

Present indications point to a decrease in the production of American-Egyptian cotton in Arizona of 35,000 bales.

GINNING REPORT AS OF NOV. 1, 1929.

According to the report issued to-day by the Census Bureau, 10,889,000 bales of this year's American cotton crop were ginned up to the close of business on October 31. This compares with 10,162,000 bales to the same date last year, 9,921,000 bales two years ago, and 11,254,000 bales in 1926. The amount ginned since October 17, when the last report was made up, is 1,790,000 bales, against 2,014,000 bales in the same period last year, 1,007,000 bales two years ago, and 2,526,000 bales in 1926.

Included in the total are 369,000 round bales and 11,000 bales American-Egyptian, against 400,000 round bales and 13,000 bales American-Egyptian a year ago.

The following table gives details with comparisons:—

	1929.	1928.	1927.	1926.
Alabama	1,091,000	818,005	1,085,807	1,128,176
Arizona	60,000	61,567	39,327	50,428
Arkansas	1,062,000	761,099	668,968	970,952
California	98,000	81,638	33,718	62,521
Florida	30,000	17,701	16,527	27,474
Georgia	1,031,000	784,408	1,009,013	1,102,101
Louisiana	746,000	586,177	476,102	615,649
Mississippi	1,541,000	1,099,999	1,112,120	1,275,500
Missouri	102,000	49,229	44,022	116,215
New Mexico	37,000	33,184	38,314	24,997
North Carolina	391,000	497,126	552,834	715,035
Oklahoma	705,000	752,864	620,203	632,395
South Carolina	535,000	513,360	598,649	676,316
Tennessee	297,000	218,680	220,291	267,681
Texas	3,143,000	3,865,022	3,392,707	3,564,934
Virginia	17,000	20,729	9,919	17,711
Other States	3,000	1,697	2,325	5,788
Total	10,899,000	10,162,482	9,920,846	11,253,873

MARKET LETTERS.

Mr. John A. Todd sums up his views in the Annual Report on Cotton Market Conditions of the Liverpool Cotton Service in the following words:—

"In conclusion, the position this year is rather mixed. Taking American by itself, the indicated supply for the coming season is sufficient, but it does not justify the hope of an addition to the carry-over. On the other hand, the Egyptian carry-over is fairly large and crop prospects are good, while the prospective supply of other varieties, especially Indian and Russian, indicates an increase on last year's figures. The world's supply of cotton of all kinds, therefore, is likely to be the largest since 1926, but the present level of prices fully reflects that position, and unless the further development of the season results in an increase of prospects of supply we think the trend of prices, of American cotton at least, should be upwards.

WORLD'S COTTON CROPS—AMERICAN *v.* OTHERS.

Under this heading Mr. John A. Todd, of the Liverpool Cotton Service, has prepared a very instructive table, which we reproduce together with his remarks:—

500-lb. bales, 000's.

Season	American ex linters	Others	Total	Others, % of Total
1914-15	16,135	11,188	27,323	41·0
1920-21	13,440	7,928	21,368	37·1
1921-22	7,954	8,076	16,030	50·4
1922-23	9,762	9,750	19,512	50·0
1923-24	10,140	10,171	20,311	50·0
1924-25	13,628	11,954	25,578	46·7
1925-26	16,104	12,457	28,565	43·6
1926-27	17,977	11,030	29,007	38·0
1927-28	12,956	11,999	24,955	48·1
1928-29	14,478	12,050	26,528	45·4
1929-30	14,915	12,685	27,600	46·0

But the total amount of this increase is not enough to make very much difference if it were not for another reason. The real trouble is that the American crop is deteriorating, not only in quantity but also in quality, and particularly it is losing ground in just those qualities of cotton which Lancashire most used, especially Texas cotton. The result is that Lancashire spinners, who formerly were very largely dependent on Texas cotton for their main supplies, are now being forced to look elsewhere for good quality cotton. This is the reason why the Argentine crop has attracted so much attention in Lancashire, while others, like Uganda and Tanguis, and even West African and the better varieties of Indian cotton, have been used to a larger extent. At the same time, the relative cheapness of Uppers has made them compete very usefully with the best grades of American cotton, especially the Mississippi Delta staples.

The truth is that the trade attitude to outside growths as a whole has completely changed in the last ten years. In the old days American spinners could hardly be induced to look at outside growths, because the supply was small, and, still more serious, it was irregular. If a spinner tried a new variety, and found it suitable, he was liable to find next year that the supply of that cotton was not available. But the recurring periods of high prices for American have steadily forced the spinners to try substitution, and they have learned the lesson permanently. Now they are not tied to any one kind of cotton, but are always on the look out for anything else that is satisfactory and cheap at the time. This state of affairs has come to stay, and it is on the whole a good thing for the trade.

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Prof. Paolo Alberzoni, Via Gesú 7, Milan.
General Director of:
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Italy:

Dr. Silvio Soldini, Cotonificio Cantoni, Via Brera 12, Milan.

Czecho-Slovakia:

Ing. Otto Pick, Firma E. G. Pick, Oberleutensdorf.

The Minister of Agriculture of Egypt and the President of the International Cotton Federation are ex-officio members.

General Secretary: ARNO S. PEARSE.
Assistant Secretary: JOHN POGSON.

EGYPTIAN COTTON

The Remarkable Instability of Weight Shown by Bales of Cotton.

By W. LAWRENCE BALLS, *Sc.D., F.R.S. For communication to the International Cotton Congress at Barcelona. September* 18th *to 22nd*, 1929.

During the month of July, in Egypt, such a room as my office at Giza in the Cotton Research Board building shows large diurnal variations of relative humidity if the windows are left open day and night. The variations are broadly similar from day to day, with a minimum of 40 per cent. at 3 p.m. and a maximum of 90 per cent. at 5 a.m.; the corresponding temperatures are approximately 35° C. (95° F.) and 18° C. (65° F.).

Such a room, very nearly representing out-of-doors conditions, provides ready-made experimental treatment for studying the response of cotton to short-period variations of relative humidity. Opportunity was therefore taken during this summer to instal suitable apparatus in this room and makes continuous records, through day and night, of the variation in weight of Sakel cotton put up in various forms and quantities.

MATERIAL.

The various forms in which the cotton was put up were respectively "loose" and "baled," and the various quantities ranged from 355 kilogrammes (one-third of a ton) to 100 milligrammes (one and a half grains); thus:—

(*a*) *Baled*:
- (1) A steam-pressed bale* from Alexandria; 782 lbs.
- (2) A screw-pressed sample bale; 5 lbs.
- (3) A ball of lint tightly wound with sewing cotton; under one ounce.

(*b*) *Loose*:
- (1) 50 grams.
- (2) 20 grams; this being the duplicate of (*a*) 3 in quantity, but different in form.
- (3) One hundred milligrammes.

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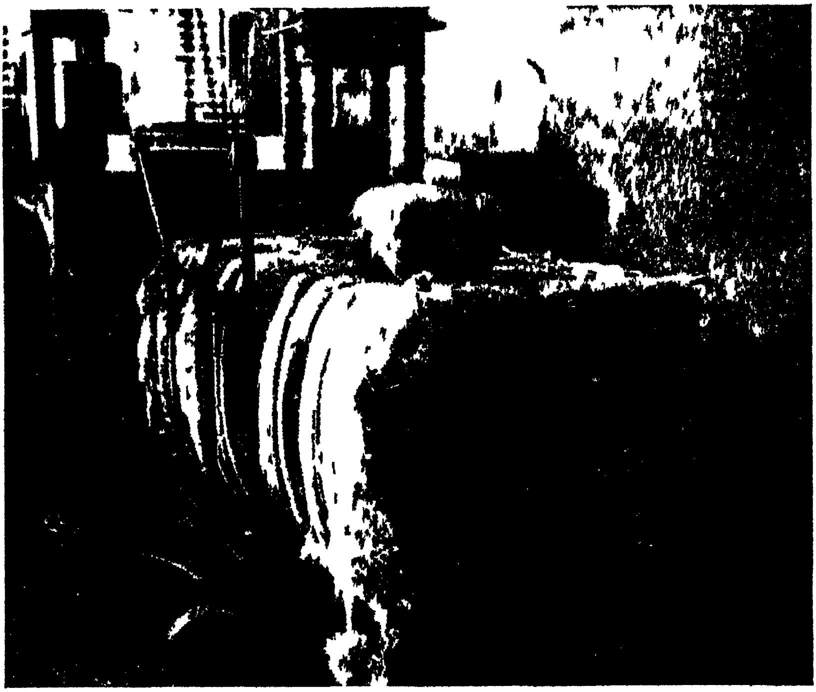
* I am much indebted to Mr. Charles Ross, British Egyptian Cotton Co., for lending me this bale.



THE THREE BALES

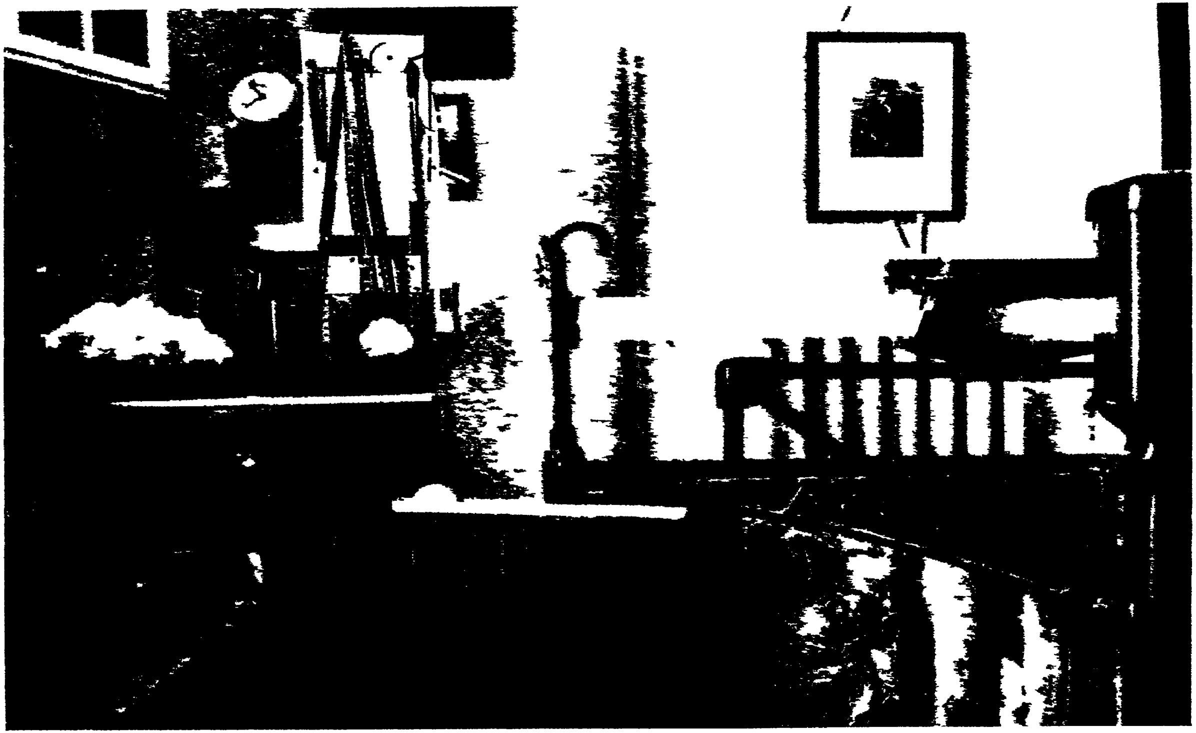
Toy bale resting on the sample bale which is completely wrapped in sacking The steam pressed bale is in position on the weighing machine

APPARATUS

The device which made it possible to obtain continuous records will be described elsewhere Though built a year ago it was used for the first time on this work, and consists of a mechanism which locates and records any required position by feeling for an electric contact By simple additions to various types of balance, this mechanism can give us weight records It was applied to a torsion micro-balance, to a rough type of chemists' balance, and to a one-ton Avery weighing machine, for the purposes of the present account

AIMS

The objects sought were twofold The first was the collection of any facts which might be revealed by such unbroken records The other was to find out how closely the real weight of cotton in a single day would approach the eventual weight attained by prolonged exposure, this was of interest as a check on the theoretical figures given to the Zurich meeting of the Joint-Egyptian Cotton Committee, which showed the "Natural Moisture Content" to range from 5 per cent to 12 per cent in different parts of Egypt at different times of the year This latter object may be dismissed



‘LOOSE’ AND ‘BALED’ COTTON

Twenty grams each in weight on opposite pans of an ordinary balance with the chain weighting arrangements in place. The actual recording mechanism is hidden beside the clock at the back. The chain and electric contacts are seen on the Avery machine ready to be attached again to the recorder at once by stating that small quantities of loose cotton in calm air do vary, as indicated in my Zurich note; indeed, the variation is even greater, since the Zurich figures were monthly averages, whereas the weight under such conditions follows the hourly variation quite fairly closely, and thereby can cover in Egypt a range from 2 or 3 per cent. to 18 or 20 per cent. So much for "natural moisture," if the conditions of its formation are not defined!

RELEVANT SCIENTIFIC KNOWLEDGE.

We now turn to observe the various points of practical novelty and interest collected from these records, though it is difficult to make them understandable without actual graphs, and much of the interest must be missed. Before such description, however, it is desirable that the reader should appreciate four facts previously known to science, which seemed to have little to do with commerce, and yet from them we could have predicted everything here described; hence the expression above of "practical novelty."

(*a*) The name "Hysteresis" is applied to a phenomenon which is common to many properties of matter. In this particular case it has long been known that cotton shows "Hysteresis" in its weight relationship to atmospheric moisture; that is to say, that, if damp cotton has been dried by exposure to air of, say, 50 per cent. relative humidity it will hold more water than would be held by some dry cotton which had been damped by exposure to the same air of 50 per cent. relative humidity. In simple words, "Hysteresis" here means that atmospheric water can only be pushed in or pulled out of the cotton by applying some excess pressure. Hartshorne pointed out the importance of this in making moisture-content measurements.

(*b*) Another fact, also studied many years ago by Orme Masson, is this: that when cotton absorbs water vapour it gets warmer, and it cools down when losing water.

(*c*) The third fact, observed by Slater some five years ago, when studying the electrical conductivity of cotton on single hairs, is a by-product of this "Masson effect," and it might reasonably be expected to show up in the weight as well as in the conductivity. This third fact might well be called the "whiplash effect." The effect appears when a hair has been exposed to constant humidity conditions for a day or two; if the conditions are then changed *suddenly*, e.g., by merely breathing a puff of damper or drier air at the hair, it starts instantly to respond by the appropriate conductivity (and presumably weight) change. But the response quickly dies out, being overcome by a violent counter-response in the opposite direction, which in its turn is opposed; and so, for an hour or two, the effect of this single disturbance thus continues gradually to fade away. The graph plotted to represent it looks like the rippling outline of a whip-lash.

(*d*) The fourth fact, also observed by Slater, is that for any given change of relative humidity the cotton loses its conductivity by drying much more quickly than it gains it on wetting.

RAPID OSCILLATIONS OF WEIGHT.

We shall make quicker contact with practice if we begin with the antics performed by the commercial steam-pressed bale. This left Alexandria on a Monday, arrived in my office during my absence and was placed there on the weighing machine at 2 p.m. on the Thursday. It is hardly necessary to remind the reader that Giza (near Cairo) is a drier climate than Alexandria. The windows were closed until I arrived next morning and fitted the few Meccano parts needed to make the weighing machine self-recording. The windows were then opened and the record begun at a weight of 355.800 kilogrammes. It is important to notice that the bale, accustomed to the comparatively damp climate of Alexandria until three days before, and having had 20 hours of perfect peace and only a moderate change of relative humidity in a closed room with closed shutters, inside a closed building (Friday being the weekly holiday in the Egyptian Service), had been (accidentally) given a good opportunity to stabilize its moisture content. Also, it is important to notice that the opening of the windows at 11.45 a.m. admitted the north breeze of air which was at that moment 10 per cent. drier than the air already in the room.

Now for the result: The weight of the bale fell so rapidly that I believe the overnight weight to have been more than 356,000 kilogrammes, rather than the smaller figure I have given; anyhow, by 1-10 p.m. it had dropped to 355.300; a perfectly reasonable loss, during one and a half hours, in the dry air, of more than a pound of water. But although the minimum relative humidity of the air on this particular day was not reached until 5 p.m., the bale turned back at 1-10 and rapidly grew heavier till by 1-20 (in 10 minutes) it had gained 350 grammes! It was simply unweighable except by the continuous recorder.

These oscillations continued notable until past 4 p.m.; for instance:—

2 p.m.	2-55 p.m.	3-5 p.m.	3-10 p.m.	3-15 p.m.
355,600	355,250	355,300	355,200	355,520

(Over ½ lb. in five minutes.)

After 5 p.m. it seemed to have become accustomed to standing in a current of air of inconstant humidity, and for the next two days the records never showed a bigger change than 100 grams in any short period, such as five minutes, though long-period changes (to be described later) were happening.

Leaving these long-period changes for a while, let us pass on from the Friday evening to the following Monday evening, when the room was closed and locked and the key taken away. Only a fanlight over the door was left partly open by an oversight. The intention in this closing up was to find out if the bale, so to speak, "remembered" what had been happening to it, in other words, to see if it consisted of concentric shells of slightly damp and slightly dry cotton. No evidence for this was shown (though it probably exists), but the record found next morning at 10-30 a.m. on my return to Cairo was even more strange.

At 6-30 a.m. the main building had been opened, and damp air currents began circulating in the corridor outside my locked-up office. Also, the fanlight was noticed and closed from the outside about 6-40 a.m. The bale had dropped a few grams until midnight, and since then it had stayed quite steady at 355,080 until 6.30 a.m. :—

At 6-40 a.m. it weighed 355,220, gaining 140 grams.

At 6-50 a.m. it weighed 354,980, losing 240 grams (in 10 minutes).

At 7-5 a.m. it weighed 355,130, gaining 150 grams.

As before, the oscillations slowly became less violent and the long-period changes took control.

Now there can be little doubt that what has been described is the "whiplash effect" observed by Slater as a consequence of the Masson effect. If we assume, as we must, that these sudden changes can only take place on the surface of the bale—(there is no time for them to go deep)—then the diurnal change in weight might also be largely superficial.

THE DAILY OSCILLATION

The diurnal change is the next feature of interest. It amounted to as much as 200 grams sometimes. It would be expected to follow the 50 per cent. diurnal variation in humidity; it does, and it does not! That is to say that when the air humidity starts to fall at sunrise, the bale weight instantly starts falling with it.

But when the air humidity starts to rise, about 3 p.m., the bale completely disregards it, and instead of rising in weight it continues falling as if nothing had changed, until 10 p.m. or sometimes later. The moisture gets out of the bale at the first chance to do so; it only gets in with a big excess of humidity behind to push it. This is the same result as Slater observed in the fourth of our relevant scientific facts. Thus there is a big "lag" on the uptake of water, none on its loss.

SUPERFICIAL NATURE OF CHANGES ALREADY DESCRIBED

Next we can test for the localization of the water in this diurnal change, by comparing bales of different sizes. As our big steam-pressed bale is 17,000 times the size of the toy bale, no exact determinations are needed at present; we merely need to know the approximate magnitude of the quantities involved, and the following are the essential figures in rounded numbers :—

	OBSERVED			CALCULATED	
				Diurnal change expressed in relation to	
Bale	Weight in grams	Measured area of surface in sq. cm.	Usual diurnal weight change in grs.	*Weight* mgs. per gram*	*Surface* mgs. per sq. cm.
Alexandria steam pressed	355,000	37,000	200.0	0.6	5
Sample	2,200	2,400	18.0	8.0	7
Toy	20	90	0.8	40.0	9

* Viz. 0.06, 0.8 and 4.0

Having regard to the enormous range of bale-weight, it is evident that the figures in the last column show (by being practically constant) that the amount of the diurnal change is directly proportional to the surface and quite independent of the weight.

Minor details, such as the more or less dense packing of the three bales, and the protection afforded to some 7,000 sq. cm. of the big bale by contact with the weighing machine platform, are not worth taking into account for our purpose of sketching broad outlines; if we did, the figures would be still closer together.

BEHAVIOUR OF LOOSE COTTON

At this stage we may conveniently summarize most of the information obtained from the "loose cotton" in contradistinction to "baled cotton". The loose cotton is assumed to be fluffed out so that air currents have easy access to all parts of the mass. In this condition the surface is theoretically the total surface of the component individual hairs (about 1 sq. cm. for 0.3 mgs.), though it is experimentally difficult to obtain such a surface except on a tiny tuft of cotton. Also, we know that there is a time-lag not only on uptake but (to a less extent) on loss of moisture. The chief feature of the results in contrast with the "baled" cotton is that, in spite of these considerations, the amount of diurnal change does approximately follow the Weight of loose cotton, in contrast to the Surface of bales.

The actual change was barely 3 mgs. on 100 mgs. weight of loose cotton, for a variation of relative humidity which should have given theoretically a little more than this amount. But this only applied to drying conditions in quiet air, in which the cotton functioned as a sensitive hygrometer. While wetting, or in moving air, the "hysteresis" or the whiplash effect introduced a time-lag and spoiled the parallelism. Further investigation might be worth while, seeing that the variation in weight of cotton is sometimes used to operate humidity-control devices, for which it would seem to be more efficient in a cotton mill than wet and dry bulb thermometers or hair-operated controlling hygrometers.

Again, the behaviour of loose cotton when placed in moving and variable air is far more eccentric than when the air is calm and its moisture content only changes slowly. Indeed, it may well be the case that some of the defects of the wet-bulb thermometer (with a cotton wick) are implicated here.

Long-Period Changes

For the principal point of interest which remains to discuss, we return to the steam-pressed bale. Figures already quoted show that its steady weight in a closed room was at least 355.800 during Thursday night, and had dropped to 355.080 on the following Monday night under similar conditions; a loss of 720 grams, or more than 1½ lbs. in four days, being 180 grams daily average. These days were respectively the 11th and 15th July. It remained undisturbed on the weighing machine, and further records were taken continuously from the 24th to the 27th of the same month. During these days the loss averaged 150 grams, determined with rather more accuracy by an extension of the weighing method which may be worth description.

It had been found in the intervening days that the Sample bale and the Toy bale reacted much the same as the big one in their "whiplash," and in the time-lag on wetting. The toy bale was therefore used to damp out some of the brief oscillations due to puffs of wind, and provide a less eccentric record on the machine; since both toy bale and big bale reacted similarly, only the long-period differences between them were recorded. Moreover, the toy bale had reached stability, merely oscillating daily between the same weight limits. So the toy bale was hung on the weighing arm of the Avery machine, where its diurnal change of 0.8 grams was multiplied more than 200 times at the weighing platform and consequently balanced the diurnal change of 180 grams in the big bale. In this way it was shown that the big bale was relatively heaviest just before noon (during the drying stage) and relatively lightest after midnight, as one would expect; the day-to-day decrease, 20 days after leaving Alexandria, was—as already stated—150 grams.

It would be interesting similarly to have followed the regain of weight when the bale was sent back to the climate of Alexandria on the 29th of the month.

Conclusion.

It should be clearly understood that these results are merely those of an attempt to obtain a preliminary sketch of the unexplored features of interest which we knew must exist in baled cotton, if a suitable method for continuous weighings were made available. They covered a good deal of ground in less than three weeks with personal attention only given in odd half-hours, when time happened to be free. Detailed investigations in Egypt—near the desert and near the sea, in open air and in closed stores—as well as in Lancashire, together with extensions over long periods by simple daily weighings, could not fail to be interesting, and quite probably useful.

Lastly, it may be amusing to notice that the diurnal change of this steam-pressed bale (180 grams) is about equivalent to sixpennyworth of cotton. Therefore, a simple and assured income might be made if cotton was always sold on weighings made at dawn, but bought on weighings made after the evening meal! Sixpence on every bale is double the present amount of the British cotton-growing levy.

Moisture in Egyptian Cotton.

Analysis of Returns received by the International Cotton Federation.

Since the Brussels meeting comparatively few returns have been received, altogether 182, mostly from Czecho-Slovakia and Switzerland.

The following Alexandria firms have delivered *Excess of Fibre* (i.e., humidity was less than 8½ per cent. regain):—

Key No.	*Average*	in *Shipments*	Key No.	*Average*	in *Shipments*
1	0.98	1	4	0.20	2
2	0.35	4	5	0.17	8
3	0.26	7	6	0.10	1

The following firms have delivered *Excess of Moisture*:—

Key No.	*Average*	in *Shipments*	Key No.	*Average*	in *Shipments*
7	0.12	1	16	0.60	4
8	0.17	29	17	0.64	6
9	0.26	31	18	0.65	1
10	0.42	1	19	0.70	6
11	0.42	2	20	0.80	3
12	0.44	23	21	0.84	4
13	0.50	26	22	0.88	2
14	0.52	16	23	1.05	1
15	0.59	2	24	1.30	1

The average excess of moisture of all the 182 shipments works out to 0.486 per cent., which is very close to our previous result, published at the Brussels meeting, viz.: 0.460. The first tabulation, submitted at Zurich, showed 0.551.

Moisture in Egyptian Cotton.

Report of the Sub-Committee appointed by the Alexandria General Produce Association to study question of Humidity of Cotton in preparation for the Barcelona Congress.

(*Original French Text follows.*)

At the Cotton Congress at Alexandria in 1912 efforts were made for the first time to fix a standard in order to stop excessive humidity found in cotton, and spinners proposed as a basis 8½ per cent.

According to the decision of the Congress, the spinners were asked to study further this question, and to establish regular statistics of tests of shipments made by exporters, but nothing was done.

In 1927, at the Congress in Alexandria, this was one of the important subjects, and a paper on this subject was submitted by the Swiss Spinners' Association, to which Mr. S. R. P. Carver replied. The discussion could not be brought to an end, and no decision was taken owing to lack of elements for discussion or of sufficient statistical data. The discussion and decisions to be taken were postponed to the Barcelona Congress, which would give time to collect statistics for the guidance of the Congress in the decisions to be taken.

In the course of these last two years studies on the question have been undertaken for the purpose of establishing, if practicable, a standard percentage of moisture which would not be an impediment to the normal course of transactions.

Spinners ask for 8½ per cent. humidity standard, on dry weight, generally termed "Bradford Standard." This is the theoretical amount of humidity-regain of cotton dried to zero (i.e., bone-dry weight) exposed to contact of atmospheric air during 24 hours. The weight difference resulting between this and the weight after 24 hours' exposure constitutes the regain, and its relation to the dry weight is considered *theoretically* equal to 8½ per cent.

It is, however, evident, even to an outsider, that this theoretical figure of 8½ per cent. cannot be the *actuality*. The regain of dry cotton may vary according to the degree of humidity in the atmosphere (see Dr. Balls' "Studies of Quality in Cotton," page 30, Appendix A), and according to the nature of the cotton fibre, as to whether the original tube diameter of which the hair is composed is more or less small (see Dr. Balls' "Studies of Quality in Cotton," page 50, Appendix B).

We must, therefore, from the very outset throw out the figure of 8½ per cent. humidity content, suggested by the spinning industry, as being absolutely Utopian and therefore not feasible.

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On what line should we proceed in order to arrive at a useful figure?

The degree of humidity in cotton emanates from the fields, and is therefore not constant, it will vary according to the districts where the cotton was grown, and it will be influenced by the temperature and humidity during each season This humidity is subject to various causes

It has been stated that the "natural" humidity contents may vary from 5 to 15 per cent, according to locality, season of year and day (Letter of Dr Balls, F R S, chief botanist of the Ministry of Agriculture, addressed to the Association)

Besides the natural causes which influence these variations of moisture there are others which are likely to increase considerably the moisture content We refer to the humidification of ginned cotton, before pressing, in the ginning factories, sometimes even by the cultivator before putting the cotton in bags

It must also be considered that the cotton in the course of ginning is subject to a drying process in consequence of its passage between the fixed knife and the leather roller In the course of this passage the friction causes the temperature of the fibre to rise to a pretty high degree

This drying-up gives the cotton a woolly appearance and the impression of a defective lustre In order to restitute its normal aspect and to facilitate and render possible its sale at Minet-el-Bassal it becomes necessary to humidify the cotton in the ginning rooms When it arrives in Alexandria the weight of cotton is checked before warehousing, and experience has shown that it loses on the way from 2 to 5, sometimes 7 rotles per bale, which is equal to ¼ per cent to ⅞ per cent

We have learnt from experience, and in consequence of complaints made by spinners, that cotton must contain a certain degree of moisture, it is for these reasons that one adds a little water in Alexandria when the state of the cotton requires it

The humidification of cotton in the Interior (ginning factories) is the cause of variations found in the amount of moisture of exported cotton

Of the exported cottons there are hardly 25 per cent which are bought direct from the cultivators, the balance is bought in the market of Minet-el-Bassal, as the following figures, compiled by us, show —

	Bales exported	Of which bought in Alexandria		Per cent
1923–24	930,790	678,476	=	73
1924–25	938,241	715,945	–	76
1925–26	925,103	712,338	–	77
1926–27	1,016,552	792,167	–	78
1927–28	911,119	645,174	–	70

It is evident that under these circumstances one cannot force the exporters to guarantee another figure than that indicated by the average of exported cottons It follows that one has to find out

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* Certain lots of cotton were shipped as an experiment, half slightly watered, and the other half not watered The watered lots were approved, whilst complaints were raised as regards the staple of the others

this average, and therefore the special Sub-Committee of the Association has asked exporters to collect statistics of moisture tests of all the cotton exported during the period since the 1927 Congress (or as much as possible) in order to enable us to find out the average humidity of the largest number of cotton bales over as long a period as possible

It is clear that these figures do not state the amount of water originally contained in cotton, but they represent the average of all shipments known to Alexandria, particularly of the large shippers, of a period during which they have set to work in order to conform to the wishes of the spinning industry for the purpose of finding a practical basis of settlement

These are practical figures, feasible without great impediments to the trade, obtained under normal conditions of work, and for this reason very recommendable for the adoption by the two parties In the daily routine of business one cannot hope to attain the ideal one has to try to seek what is practicable and feasible without prejudice to the contracting parties

The results obtained have been tabulated by the Censor of our Association 2,844 lots, representing 219,159 bales, were examined, these have given the following averages —

	Per cent
Sakel	9 03
Ashmouni	8 85
Zagora (Lower Egypt)	8 98
Pilion	9 24

The tests were made by the members according to the instructions of the Swiss Testing Houses at St Gall (both as regards sampling and actual testing), but we have reduced the number of bales from which samples were taken

This reduction has been undertaken for economy's sake, but it cannot have an appreciable effect on the final results The samples were taken at once after pressing

It now remains to draw the conclusions from the results obtained

The Alexandria General Produce Association, in view of the above figures, declares that one cannot establish nor accept a guarantee of amount of moisture, but if a decision has to be taken in this sense, the basis must not be below 9 per cent (nine) of the dry weight of the cotton

This figure will be an average one, a margin or tolerance of 0 3 per cent must be admitted, as it has been scientifically proved that the average dispersion of the humidity in a bale is equal to $\pm \sqrt{\frac{0\ 54}{N}}$, " N " being the number of tested bales Professor

Yovanovitch, of the Swiss Testing House at St Gall, confirms in his letter of September 10, 1928 (Appendix C) these figures for the margin

The final figure must therefore show a margin of 0 3 per cent up and down If this figure is exceeded the exporter will pay the spinner the excess found over 0 3 per cent, but if, on the contrary, the tests show a humidity content below 8 7 per cent (the guaranteed figure, less tolerance) then the spinner will reimburse the exporter the amount of excess fibre

METHOD AND PLACE OF TESTING

The Alexandria General Produce Association states distinctly that it will only accept as place where the tests are to be made the port of shipment It is, of course, clear that an exporter cannot be held responsible for other conditions than those existing at the time when he supplies the goods for which he is responsible

He has already, through trade usage, been made responsible for the landing weights at ports of disembarkation, and not at ports of embarkation Experience has shown that cotton loses weight in transit up to the port of disembarkation in consequence of its exposure to air currents or to the great heat of the ships' hatches, which is often caused through storage near boiler and engine

At the point of disembarkation cotton may be exposed to rain, snow, excessive humidity through fogs, and, moreover, it is often stored at its entry into the mills in places where, either naturally or artificially, excess of moisture exists

The shipper can neither watch nor control what happens to his cotton as soon as it leaves his hands Has it increased in weight or moisture contents? He does not know, and cannot know it

As the shipper has to pay if the cotton has a higher moisture content than the guaranteed standard he has every right to demand that the sampling and testing are carried out in his own presence, under his superintendence and his control

A direct consequence of this moisture guarantee is the checking of the weights at port of embarking If the exporter is held responsible for the moisture content he has the right to demand that the spinner recognizes the invoice weights, the weights officially established at time of embarking the cotton It would be too unjust to have to bear the loss, for example, of 0 25 per cent excess of humidity of a lot (excess found to exist on the weights in testing), and then six days later, another claim is made for 0 25 per cent for a shortage found in the same weights It is this excess of moisture which has evaporated in transit, and which the spinner encashes or will claim to encash twice

Conditioning Results of the Alexandria General Produce Association on Samples taken from (broken) Bales after pressing.

CLASS	SAKELLARIDIS No. of tests 884		ASHMOUNI No. of tests 986		PILION No of tests 171		ZAGORA B. E. No. of tests 128		NAHDA, MAARAD, FOUADI No. of tests 139		OTHER VARIETIES No. of tests 52	
	Average humidity per cent.		Average humidity per cent.		Average humidity per cent.		Average humidity per cent.		Average humidity per cent.		Average humidity per cent.	
	Dry weight	Wet weight	Dry weight	Wet weight	Dry weight	Wet weight	Dry weight	Wet weight	Dry weight	Wet weight	Dry weight	Wet weight
Good and above :												
General average ..	8·90	8·40	8·72	8·15	9·19	8·58	8·93	8·35	9·08	8·25	9·40	8·65
Minimum average ..	8·15	7·86	8·01	8·50	8·78	8·40	8·20	7·50	7·80	7·82	8·97	8·54
Maximum average ..	9·76	9·06	9·23	8·88	9·85	8·70	9·65	9·40	9·76	8·63	9·70	8·76
Fully fair and good not included :												
General average ..	9·08	8·32	8·98	8·42	9·28	8·63	9·03	8·87	9·10	8·42	9·12	8·14
Minimum average ..	8·60	9·60	8·42	7·85	8·82	8·10	8·94	8·55	8·79	8·27	8·86	—
Maximum average ..	9·85	8·78	9·58	8·83	10·00	9·00	9·14	9·21	9·46	8·64	9·67	—
Above and fully fair :												
General average ..	9·18	8·66	8·85	8·46	—	—	—	—	8·39	—	—	—
Minimum average ..	8·77	8·58	—	8·13	—	—	—	—	—	—	—	—
Maximum average ..	9·41	8·84	—	8·80	—	—	—	—	—	—	—	—

Number of bales represented by the tested lots, 219,159

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RAPPORT du Sous-Comité chargé d'étudier la question de l'humidité en vue du Congrès de Barcelone.

C'est au congrès cotonnier d'Alexandrie, de 1912 que, pour la première fois, il a été question de l'opportunité de chercher à établir des bases afin d'arrêter l'humidité excessive qu'on constatait dans le coton, et les filateurs ont proposé une base de 8½%.

Suivant décision de ce congrès, les filateurs devaient poursuivre l'étude de cette question et établir des statistiques régulières de conditionnement sur les livraisons faites par les exportateurs, mais rien n'a été fait.

En 1927 au congrès d'Alexandrie, ce fut une des questions importantes à l'ordre du jour, et une étude sur la question fut présentée par l'Association des Filateurs Suisses à laquelle réponse fut donnée par Mr. S. R. P. Carver. La discussion ne put être poussée à bout et aucune décision ne fut prise faute d'éléments de discussion ou chiffres statistiques suffisants ; on remit la discussion et les décisions à prendre au Congrès de Barcelone, ce qui permettrait de recueillir des statistiques de nature à guider le Congrès au sujet des décisions à prendre et des accords à intervenir.

Au cours de ces deux dernières années des études sur la question ont été faites dans le but d'établir s'il était pratiquement possible de fixer un pourcentage d'humidité qui ne constituerait pas une entrave à la marche normale des transactions.

La filature demande qu'on fixe à 8½% la teneur d'humidité, à déterminer sur le poids sec (après dessèchement) ce qu'on dénomme BRADFORD STANDARD. C'est le montant théorique que regagne en humidité un coton desséché à "o" (bone-dry weight) et qu'on exposerait au contact de l'air atmosphérique pendant 24 heures. La différence en poids qui résulterait entre le poids sec et le poids après 24 heures d'exposition, constitue le " regain " et sa relation au poids sec considérée *théoriquement* égale à 8½%.

Il est cependant évident même à un profane, que ce chiffre théorique de 8½% ne peut représenter la réalité. Le regain de poids du coton sec doit varier selon le degré d'humidité de l'atmosphère (voir Dr. Balls " Studies of quality in cotton " Page 30 Appendix A) et de la nature de la fibre du coton, selon que le diamètre original du tube capillaire qui compose la fibre du coton est plus ou moins large. (Voir Dr. Balls " Studies of quality in cotton " Page 50 Appendix B).

Il faut donc écarter dès le début le chiffre avancé jusqu'à présent par la filature, d'un contenu d'humidité de 8½%, comme purement utopique et par conséquent irréalisable.

Sur quelles bases devrait-on donc procéder pour déterminer un chiffre utile ?

Le degré de la teneur d'humidité du coton venant des champs n'est pas constant ; variant selon les contrées, il est influencé par la température et l'humidité qui règnent à chaque époque de l'année. Cette humidité est sujette à des variations dues à des causes diverses.

Il a été constaté que le contenu d'humidité " naturel " à l'exterieur peut varier de 5 à 15% suivant la localité et le temps de l'année ou du jour. Lettre du Dr. Balls D.Sc. F.R.S. Chef botaniste du Ministère de l'Agriculture adressée à l'Association.

Mais en plus des causes naturelles qui provoquent ces variations il existe des pratiques qui tendent à augmenter dans une proportion considérable la teneur d'humidité.

Nous faisons allusion à l'humectation du coton égrené, avant son pressage dans les usines d'égrenage, quelques fois même avant son ensachement par le cultivateur.

En dehors de ce qui précède, il y a lieu d'ajouter que pendant le procédé d'égrenage, le coton subit un dessèchement de la fibre dû à son passage entre le couteau fixe et le cuir du rouleau. Au cours de ce passage la friction fait monter la température de la fibre à un degré assez élevé.

Ce dessèchement donne au coton une apparence laineuse et l'impression d'une soie défectueuse. Afin de lui rendre son aspect normal ; de faciliter et rendre possible sa vente au marché de Minet-el-Bassal, il devient nécessaire de l'humecter dans les salles d'égrenage. En arrivant à Alexandrie, le poids du coton est contrôlé avant l'emmagasinage et l'expérience démontre qu'il a perdu en route de 2 à 5, parfois 7 Rotolis par balle, ce qui équivaut à ¼% jusqu'à ⅞%.

Nous avons appris par expérience et à la suite de plaintes faites par les filateurs que le coton doit contenir un certain degré d'humidité ; c'est pour ces raisons que lorsque l'état du coton le nécessite on ajoute à Alexandrie un peu d'eau.*

L'humectation du coton à l'Intérieur (usines d'égrenage) est cause des variations constatées dans la teneur d'eau des cotons exportés.

Sur les quantités exportées il y a à peine 25% qui soit acheté directement aux cultivateurs, le restant est acheté sur le Marché de Minet-el-Bassal ainsi que le démontrent les statistiques recueillies par nous.

En	1923/24	sur	930,790	B/'s exportées	on acheta	sur place	678,476	-	73%
„	1924/25	„	938,241	„	„	„	715,945	-	76%
„	1925/26	„	925,103	„	„	„	712,338	-	77%
„	1926/27	„	1,016,552	„	„	„	792,167	-	78%
„	1927/28	„	911,119	„	„	„	645,171		70%

Il est évident que, dans ces circonstances, on ne peut forcer les exportateurs de garantir un chiffre autre que celui que la moyenne a indiqué être le chiffre courant des cotons exportés. Il ne reste donc qu'à trouver cette moyenne et c'est guidé par ces principes que le Sous-Comité spécial de l'Association a demandé aux exportateurs de recueillir des statistiques de conditionnement de tous les cotons exportés, pendant la période qui s'est écoulée depuis le Congrès de 1927 (ou autant que possible) pour permettre de trouver la moyenne du plus grand nombre de coton sur une durée de temps aussi longue que possible.

Il est évident que ces chiffres n'indiquent pas la teneur d'eau originale du coton mais ils représentent la moyenne de tous les exportateurs connus à Alexandrie surtout des grandes maisons pendant une époque où ils se sont mis au travail pour rechercher à la demande de la filature une base pratique de rapprochement.

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* Des lots de coton expédiés à titre d'expérience ont été divisés en deux. Une moitié a été légèrement humectée avant pressage et l'autre moitié sans humectation. Les lots légèrement humectés ont été approuvés tandis que les autres ont été critiqués pour la soie.

Ce sont des chiffres pratiques, réalisables sans grandes entraves au commerce, obtenus dans des conditions normales d'exécution des affaires, et pour cette raison fortement recommandables pour l'adoption par les deux parties. Car dans la routine journalière du Commerce, on ne peut trop s'attarder à chercher l'idéal, on doit chercher et déterminer ce qui est pratique et réalisable sans désavantage pour les contractants.

Les résultats obtenus, ont été recueillis par les Censeurs de notre Association. Portant sur 2,844 lots de coton composés de 219,159 balles, ils ont donné comme moyenne de tenuer d'eau pour :

Le Sakellaridis	9·03%
Achmouni	8·85%
Zagora Basse Egypte	8·98%
Pilion	9·24%

Les conditionnements ont été faits par les membres, suivant les indications recommandées par la Schweizerische Versuchsanstalt de St. Gall, tant pour le prélèvement des échantillons que pour la méthode de conditionner ; avec la seule différence que l'on a réduit le nombre de balles à échantillonner.

Cette restriction a été imposée pour des raisons d'économie, mais ne peut avoir une influence sensible, sur les résultats finaux. Les échantillons ont été prélevés de suite après le pressage. Il ne reste qu'à tirer des conclusions des résultats obtenus.

L'Alexandria General Produce Association considérant les chiffres ci-dessus, déclare qu'on ne peut établir ou accepter une garantie de teneur d'humidité, mais si une décision devait être prise dans ce sens, la base ne devrait pas être inférieure, à 9% (neuf) du poids sec du coton.

Ce chiffre sera un chiffre moyen ; une tolérance de 0·30% étant admise puisqu'il est scientifiquement démontré que la dispersion moyenne de l'humidité dans la balle équivaut à $\pm \frac{\sqrt{0\cdot54}}{N}$, " N " étant le nombre des balles conditionnées. Le Professeur Yovanovitch du Schweizerische Versuchsanstalt de St. Gall dans sa lettre du 10 septembre 1928 (Annexe C) confirme ces chiffres de tolérance.

Ce chiffre final devra donc comporter une tolérance de 0·30% en plus ou en moins. Dépassé le chiffre, plus la tolérance, l'exportateur devra payer au Filateur l'excédent constaté en plus de 9·30%. Si par contre le conditionnement indiquait un chiffre de teneur d'eau inférieur à 8·70% (chiffre de garantie moins la tolérance) le filateur devrait rembourser à l'exportateur le manque d'humidité constaté.

MODE ET LIEU DU CONDITIONNEMENT

L'Alexandria General Produce Association déclare n'accepter comme lieu de conditionnement que le port d'embarquement. Il est de toute évidence qu'un exportateur ne peut être tenu responsable que des conditions existantes au moment où il fournit la marchandise dont il est considéré responsable.

Déjà par les usages du commerce a-t-il été rendu responsable du poids de la marchandise non plus au port d'embarquement mais à celui de débarquement. L'expérience a démontré que le coton perd du poids pendant le trajet jusqu'au port de débarquement, par suite de son exposition aux courants d'air ou à la chaleur élevée de l'interieur des cales du bateau, chaleur accrue très souvent par le voisinage avec les compartiments des chaudières et machines.

Après débarquement le coton peut être exposé à la pluie, à la neige, à l'humidité excessive de pays brumeux, et au surplus il est souvent emmagasiné à son entrée en filature en des endroits recevant, soit naturellement soit artificiellement, un surcroit d'humidité.

L'exportateur n'a pu ni surveiller ni contrôler ce qu'il est advenu de sa marchandise depuis qu'elle a quitté ses mains. A-t-elle augmenté de poids ou en teneur d'humidité ? Il ne le sait pas et ne peut le savoir.

Et puisque c'est le négociant exportateur qui devra payer si le coton a un contenu d'humidité supérieur au standard de garantie, il a tout droit d'exiger que l'échantillonnage et conditionnement se fassent en sa présence directe, sous sa surveillance et sous son contrôle.

Une conséquence directe de cette garantie d'humidité est le contrôle du poids au port d'embarquement. Si l'exportateur est tenu responsable pour le contenu d'humidité il a le droit d'exiger que le filateur lui reconnaisse comme poids de facture, le poids constaté officiellement au moment de l'embarquement de la marchandise. Il serait trop injuste de faire supporter, par exemple, un excédent d'humidité de 0·25% sur un lot, excédent constaté sur le poids de la marchandise au moment du conditionnement, et ensuite six jours plus tard réclamer encore 0·25% pour un déficit constaté sur ce même poids ; c'est cet excédent d'humidité, qui s'est évaporé en cours de route, que le filateur encaisse ou prétendra encaisser *deux fois.*

The Determination of Humidity in Egyptian Cotton in Italy.

Report prepared by Professor CAMILLO LEVI, Director, R. Stazione Sperimentale per l'Industria della Carta e Studio Fibre Tessili Vegetali di Milano.

This short essay has the purpose of illustrating the results of the determination of humidity as carried out in Italy by the "R. Stazione Sperimentale delle fibre tessili vegetali di Milano" (Royal Office for Experimenting with Vegetable Textile Fibres in Milan) of the shipments of Egyptian cotton unloaded in the port of Genoa since the month of June of this year.

Following the example of other countries, Italy initiated some time ago the checking of the humidity contained in the consignments of Egyptian cotton destined for Italian spinning mills by

effecting rational drying tests in the spinning mills; the results were communicated in due course to the International Cotton Federation.

It was, however, considered advisable thereafter that the tests should in principle not be carried out by one or the other of the contracting parties, but should be carried out by independent and competent institutions, so as to give an absolute guarantee of the reliability of the results obtained. As a consequence our Institute made arrangements with the said Royal Office for Experimenting with Vegetable Textile Fibres in Milan for the organization of a system for checking the humidity of the consignments of Egyptian cotton arriving in Italy. The method was to be established by our Institute, which had already been engaged for some time in ascertaining the humidity in cotton in general and on fixing the mercantile weight of the cotton shipments, as well as of the other textile fibres used generally in the textile industry. The object was to ascertain the weight and the standard humidity on the basis of the normal amount of moisture of cotton.

Finding that it was necessary to this effect to take the samples as soon as the consignments of cotton were landed, it was decided that the samples should be taken in the port of Genoa. Arrangements were made with the " Consorzio Autonomo " of the port of Genoa, and suitable premises were taken near the transit warehouses for Egyptian cotton. The premises are admirably suitable, so that the cotton does not suffer any variation in its degree of humidity during the operation. The bales to be tested are conveyed to these premises, which are perfectly closed, as soon as they have been unloaded, and their weight is then established.

The method adopted, subject to the necessary subsequent variations, is as follows:—

The bales to be tested are picked out at random from each consignment to be tested; two, three or five bales will be taken, which shall be in perfect condition, out of every lot of 25–30, 50 or 100 bales, these being the numbers of bales usually composing the consignments for Italian spinning mills.

The bales picked out are taken to the said premises, weighed, and then sampled.

The taking of the samples is the most important operation from the point of view of the reliability of the result, as the sample must represent the whole bale, so that the humidity ascertained in the sample shall be representative of the humidity of the whole bale. As it may be assumed with safety that during the transport from the port of shipment to the port of destination, and during the warehousing, the degree of humidity in the bales may vary in the different layers of the bale, if the humidity is not tested immediately after landing, it was thought advisable to take the samples from various points of the bale, so that the samples would represent the various layers in various parts of the bale. The bale to be tested is therefore opened. This process will continue until another method of taking the samples without having to open the bale will be found. Efforts are now being made to discover such a method, notwithstanding the difficulties that are foreseen due to the fact that the bales are pressed with such a density as to be perfectly hard and compact like wood.

After opening the bale, the premises being perfectly closed and free of any draughts, the person entrusted with the task takes three samples along a diagonal line; the first sample is taken at a distance from one of the angles of one-fifth the height, width and length of the bale; the second sample is taken from the centre of the bale; and the third at a distance from the angle opposite the first mentioned, of one-third the width, height and length of the bale. The three small samples are placed separately in a box with three partitions. Of each one of these samples exactly 100 grammes are weighed on a precision scale with special index made for the purpose. After being weighed separately the three samples are formed into one sample weighing exactly 300 grammes. This sample is placed in a hermetically closed aluminium box, which is then sealed and sent to the Royal Office for Experiments for the purpose of the drying tests. All the operations are carried out immediately after the weighing of the bale in the same premises or room. The samples are taken and weighed always by the same person with rubber gloves on his hands. By this method the degree of humidity in the sample taken cannot vary.

The drying tests, as already mentioned, are then carried out by our Institute by means of the very latest type of drying devices made specially for the purpose, with electric heating, provided with a precision scale. In this oven the samples are dried at 100° to 105° C. up to the point of reaching "constant weight" (absolute dry weight), thus finding the contents of humidity with absolute precision to a milligramme.

The method of finding the degree of humidity by means of technically perfect drying apparatus is the most exact, and cannot be compared with the method of simply feeling the cotton in the centre of the bale. It is strange that though considerable progress has been made in the method of testing cotton by scientific means, yet the method of assessing the amount of humidity by placing the hand in the middle of the bale should still be in use. It is quite impossible, even for the best expert, to ascertain not only small differences in humidity, but even comparatively large differences by feeling with the hand.

The attached table gives for each bale the results obtained with the samples taken with the greatest care by the method described above. In this table will be found the percentages of humidity ascertained in relation to the original weight of the sample and in relation to the absolute dry weight of the sample (at 100° C.); the average percentage of humidity of the bales of each lot, based on the weight of the samples in the absolute dry state; the excess of humidity above the standard amount of moisture, deemed to be 8½ per cent., or the excess of fibre corresponding to the shortage below the 8½ per cent. It was thought advisable to give the results also of each bale, so as to ascertain any difference in humidity between one bale and another of the same lot. The table shows that sometimes there was actually a considerable difference between one bale and another.

It will be seen from the table that up to now the Royal Institute has examined 42 lots, representing altogether 1,850 bales; this number of bales is not very large; but that fact is due to the tests having been started rather late in the season. The tests are, however, being continued, and will be more numerous in the next season; the results of these tests will be reported in due course.

The attached lists will show that out of the 42 lots tested, representing 1,850 bales, 15 lots with 700 bales showed an excess of fibre corresponding to a contents of humidity below 8½ per cent. (which was taken as the average amount of moisture) varying from a maximum of 0.94 to a minimum of 0.01 per cent., whilst in 27 lots with 1,150 bales, there was an excess of humidity above the 8½ per cent., varying from a maximum of 1.89 per cent. to a minimum of 0.03 per cent.

EXCESS OF FIBRE (humidity below 8½ per cent.) :-

Bales Represented	Excess of Fibre Per cent.
50	0·94
25	0·87
100	0·86
50	0·72
100	0·62
50	0·62
30	0·59
50	0·54
30	0·23
30	0·16
25	0·15
50	0·09
50	0·06
30	0·03
30	0·01
Total 700	

EXCESS OF HUMIDITY (humidity above the 8½ per cent.) :--

Bales Represented	Excess of Humidity Per cent.
50	1·89
30	1·57
50	1·24
50	0·89
50	0·89
50	0·79
100	0·79
25	0·78
25	0·68
50	0·67
25	0·59
25	0·47
30	0·45
25	0·43
50	0·40
50	0·39
25	0·37
50	0·32
50	0·28
30	0·27
50	0·20
25	0·19
30	0·15
100	0·07
25	0·05
50	0·05
30	0·03
Total 1,150	

In this article the undersigned, in accordance with the programme of the Congress relating to the humidity of Egyptian cotton, has limited his scope to explaining the method followed in finding the degree of humidity. If necessary he will participate in the discussion on the subject in the Congress, and will discuss also the general problem of humidity in cotton and the important questions connected with same.

PROF. DR. CAMILLO LEVI,
Director of the " Regia Stazione Sperimentale
Fibre Tessili Vegetabli," Milan.

TABLE OF RESULTS OF THE TESTS OF HUMIDITY WITH SAMPLES OF EGYPTIAN COTTON TAKEN IN THE PORT OF GENOA SINCE JUNE, 1929.

No of samples	No of bales represented	% of humidity based on the humid weight of each sample	% of humidity based on the dry weight of each sample	% of average humidity at dry weight	% of humidity over the normal of 8½%	% of fibre in excess of the 8½% normal moisture
5	100	7·10 6·84 6·94 7·34 8·34	7·64 7·34 7·45 7·92 9·09	7·88	—	0·62
2	25	7·60 8·17	8·22 8·89	8·55	0·05	—
2	25	8·40 8·00	9·17 8·69	8·93	0·43	--
2	30	8·04 8·10	8·74 8 81	8·77	0·27	-
5	100	8·07 7·50 7·24 8·00 8·70	8·77 8·10 7·80 8·69 9·52	8·57	0·07	
3	50	8·30 7·67 8·54	9·05 8·30 9·33	8·89	0·39	
3	50	7·20 7·67 7·27	7·75 8·30 7·83	7·96	—	0·54
2	25	7·90 8·57	8·57 9·37	8·97	0·47	—
2	25	8·10 8·57	8·81 9·37	9·09	0·59	
3	50	10·00 9·07 9·17	11·11 9·97 10·09	10·39	1·89	-
2	30	7·94 10·34	8·62 11·53	10·07	1·57	
3	50	7·24 7·24 7·20	7·80 7·80 7·75	7·78	--	0·72
2	30	7·90 7·73	8·57 8·37	8·47	—	0·03
3	50	8·13 7·07 8·10	8·84 7·60 8·81	8·41	—	0·09
3	50	7·43 8·17 8·43	8·02 8·89 9·20	8·70	0·20	—

No. of samples	No. of bales represented	% of humidity based on the humid weight of each sample	% of humidity based on the dry weight of each sample	% of average humidity at dry weight	% of humidity over the normal of 8½%	% of fibre in excess of the 8½% normal moisture
2	30	8·17 7·57	8·89 8·18	8·53	0·03	--
3	50	8·10 7·50 7·77	8·81 8·10 8·42	8·44	—	0·06
3	50	8·37 8·77 8·37	9·13 9·61 9·13	9·29	0·79	
3	50	8·20 9·13 8·43	8·93 10·04 9·20	9·39	0·89	—
2	25	7·43 8·57	8·02 9·37	8·69	0·19	—
3	50	9·00 7·93 7·60	9·89 8·61 8·22	8·90	0·40	--
2	25	7·90 8·10	8·57 9·17	8·87	0·37	–
2	25	8·50 8·50	9·28 9·28	9·28	0·78	—
3	50	7·00 7·27 6·83	7·52 7·83 7·33	7·56	—	0·94
3	50	7·33 7·43 7·17	7·90 8·02 7·72	7·88	–	0·62
2	25	7·00 7·20	7·52 7·75	7·63		0·87
5	100	7·17 7·17 6·83 7·10 7·23	7·72 7·72 7·33 7·61 7·79	7·64	- -	0·86
3	50	8·07 8·47 8·67	8·77 9·25 9·49	9·17	0·67	--
5	100	8·50 8·53 8·17 8·00 9·33	9·28 9·32 8·89 8·69 10·28	9·29	0·79	-
2	30	7·80 7·50	8·45 8·10	8·27	—	0·23
2	30	8·27 8·17	9·02 8·90	8·95	0·45	—

No. of samples	No. of bales represented	% of humidity based on the humid weight of each sample	% of humidity based on the dry weight of each sample	% of average humidity at dry weight	% of humidity over the normal of 8½%	% of fibre in excess of the 8½% normal moisture
2	25	7·83 7·60	8·49 8·22	8·35	–	0·15
3	50	8·33 8·67 8·77	9·08 9·49 9·61	9·39	0·89	- -
3	50	7·90 7·97 7·77	8·57 8·66 8·42	8·55	0·05	–
3	50	9·00 9·10 8·53	9·89 10·01 9·32	9·74	1·24	
3	50	8·23 8·00 8·10	8·96 8·69 8·81	8·82	0·32	-
2	25	8·33 8·50	9·08 9·28	9·18	0·68	
3	50	8·27 7·93 8·03	9·01 8·61 8·73	8·78	0·28	
2	30	7·70 7·70	8·34 8·34	8·34		0·16
2	30	7·83 7·83	8·49 8·49	8·49		0·01
2	30	7·93 8·00	8·61 8·69	8·65	0·15	
2	30	7·17 7·50	7·72 8·10	7·91		0·59

GOVERNMENT'S CROP ESTIMATE.

On 7th October the Egyptian Government issued its first cotton crop estimate for the current year, which we reproduce:

	1929-30 First estimate. Cantars.	1928-29 Final estimate. Cantars.	1927-28 Final estimate. Cantars.
Sakellaridis ...	... 2,502,992	... 2,533,307	... 2,520,332
Other varieties	... 5,341,877	... 5,313,845	... 3,521,167
Total... ...	... 7,844,869	... 7,847,152	... 6,041,499
Actual Crop	—	... 8,011,680	... 6,096,822

According to Government estimates, the area planted to Sakellaridis this season is 847,950 feddans, against 799,523 feddans last season and 795,740 feddans in 1927-28.

Private reports suggest that the outturn of Sakellaridis will be considerably larger than the Government's estimate.

Egypt's Contribution to World's Cotton Supply.

Paper read by Mr. C. H. BROWN, B.Sc., Botanist, Ministry of Agriculture, Egypt, at the 14th International Cotton Congress, held in Barcelona, on September 18th-22nd, 1929.

I want to tell you about the present position of cotton growing in Egypt, with particular reference to some new varieties which are meeting with great success. I am an optimist with regard to Egyptian cotton. The immediate post-war years were comparative years of stagnation. There was very little central control of the cotton crop, the varieties grown were mostly in an impure state, and it was very difficult to see any satisfactory varieties to come forward to replace them.

I believe that all this is now changed, and I will try and tell you exactly how, and something of the new varieties which we hope to offer you. You are all perhaps sceptical of new varieties, not unreasonably, in view of the history of the many new varieties produced in Egypt since the beginning of the century. But these varieties have been varieties in name only during their later years. They contained in them the seeds of inevitable degeneration in the fact that no homogeneous nucleus stock of them was ever preserved. It is a truism now that no variety can be kept quite pure in the field. Crossing, and a small percentage of seed mixing in the gins, are to some extent unavoidable. The only hope of the continued life and purity of a variety therefore lies in the continual renewal of seed stocks from a pure nucleus, and in preventing the more contaminated seed from being sown. Neither of these safeguards has ever been carried out with new varieties in Egypt in the past. Facilities for them did not exist. But in recent years the machinery for these safeguards has been evolved, and the Ministry of Agriculture is able to predict confidently that the varieties which it is now propagating will not suffer the fate of most new varieties in the past. The law regulating the sowing of cotton-seed cuts off seed of more than a prescribed degree of contamination, while each variety is continually renewed from a nucleus stock, which is protected from cross-pollination.

In the future, we hope, varieties will only go out of cultivation because they are suppressed in favour of a better.

We have now in Egypt new varieties which show every sign of supplanting the varieties you have been using previously, and the main purpose of this lecture is to acquaint you with these types and our hopes for them, with a view to inducing you to test them, so that you may be ready to use them when they appear in bulk. With our actual seed-distribution facilities they will probably replace present types more rapidly than has been the case in the past.

You are all familiar with the rough general division of cotton growing in Egypt, of good-quality low-yielding varieties in the Delta, and of lower-quality higher-yielding types in Upper Egypt. The obvious lines of improvement here are to find higher yielding strains of equal quality for the Delta, and better quality strains of equal yield for Upper Egypt. In both these directions, I am glad to say, we are meeting with success. You had last year a record cotton crop from Upper Egypt, and the crop now being picked should be even bigger. Most of this increase is due to the development of new cotton lands in the southern provinces of Assiut, Giza, Kena and Assuan. It is an increase likely to continue.

We have now found two long-staple strains which suit this district. They are Giza 3, with a staple similar to that of Pilion, and Giza 7, which appears to be nearly as good as Sakel. Tests have shown that, though Giza 7 handles well, it spins even better, and in spite of it being rather shorter than Sakel I believe you will be able to get from it, certainly up to 80's and possibly up to 100's, the full strength that you are accustomed to get from Sakel. I will not go into more detail about these strains, but samples of the current year's growth are before you, and I shall be very glad to give any of you any details you may require about the merits of these strains, and where you may obtain samples for testing. I consider Giza 7 so much the most important of them that I am showing you four samples from four different localities marked on the map. It seems quite possible that in five years' time a greater area in Egypt will be sown with Giza 7 than with any other variety, and I think it is to your advantage to get to know it as soon as possible. These two varieties do not appear to suit the northern provinces of Upper Egypt, i.e., Giza, Beni Suef, Minya and the Fayum. They may eventually be grown there if they command sufficient premium, but at present we are distributing there our New Ashmouni. This is a typical Upper, but we think you will find it the best and most regular Upper you have ever used. We are, of course, still looking for another long-staple cotton which will crop well in this half of Upper Egypt and allow us to grow in Egypt nothing shorter than Giza 3, but we have not yet found the right strain. Just as an example of the way in which we are experimenting with these long-staple types in Upper Egypt, I may mention that at Komombo, the southernmost point where cotton is grown, we have tested this year six varieties, one of which is our New Ashmouni, all the other five being long-staple types. Several of these five have beaten the Ashmouni in yield. Our first high-yielding cotton for the Delta is Maarad. This is a cotton produced by the Royal Agricultural Society, not by the Ministry of Agriculture. It is longer than Sakel and saleable at 1d to 1½d per lb less than Sakel prices. It is bound to continue to increase, on account of its heavier yield. We anticipate that Maarad will displace cottons like Nahda, Pilion and Zagora, all of which have up to the present been popular with some growers in the Delta.

Giza 7 has also given yields similar to Maarad, much higher than Sakel, in the Delta. Probably in a year or two you will be able to choose between Maarad and Delta Giza 7, both offered at similar prices, the former grown mainly in the south and the latter mainly in the north of the Delta

Our present Domains type of Sakel, which furnishes the seed stock of all Sakel now grown in Egypt, does not appear to have the slightest chance in competition with the two varieties just mentioned For those of you who want to spin the finest counts we shall grow another new type, known as Sakha 4 This is longer-stapled than Domains Sakel and gives a slightly better yield Its yield is, however, not as high as Giza 7 and Maarad, and it can only survive if it commands sufficient premium over these

It has been suggested to me that you might be interested to have details of the cost of production of these new varieties as compared with that of the varieties they will replace I consider an attempt to estimate the actual cost of production of 1 lb of lint too complicated, so I shall put the information in a different form, showing you the increased profit, and leaving you to form your own opinions of the minimum price which the grower could profitably accept

As a basis, I am going to take American at 10d a pound in Liverpool, and am going to neglect charges for transport, etc, assuming 10d a pound in Liverpool to be equal to 20 cents a pound in New York and to $20 a bale in Alexandria I am then going to assume that Uppers are at 15 per cent premium, and Sakel at 65 per cent I think you will agree that these are reasonable figures to take at present This gives us Uppers at 11½d and Sakel at 16½d in Liverpool, and 23 and 33 dollars respectively in Alexandria--a 10-dollar difference At these prices the grower of Sakel, with an average yield of 3½ kantars, gets a gross return of 115½ dollars per acre, and the grower of Uppers, with an average yield of 5½ kantars, a gross return of 126½ dollars per acre

Now let us take the case of the grower of Giza 7 or Maarad in the Delta Our tests show that with either cotton he may expect a yield of 5 kantars of lint on land that would yield 3½ of Sakel I think you will agree that either cotton should be readily saleable at 1½d a pound under Sakel, that is 30 dollars in Alexandria The grower thus has a gross return of 150 dollars, an increased return of 34½ dollars, or nearly £7 per acre

To come to Upper Egypt, in its right district a grower may expect to get from Giza 7 the same yield as he has been getting from Uppers, e g, 5½ kantars At $30 this gives us $165 per acre, an increased return of $38½, over £7½ per acre These are the kind of figures which make us so confident of the future of our new cottons

With regard to our total crop, my own expectation is that the total profit, due to growing such heavy yielding cottons and to growing more valuable cotton in the South of Egypt, may lead to so much new land being brought under cotton that the total crop may reach 10 million kantars in quite a few years, and may even continue to increase beyond this figure With the continual improvement in irrigation and drainage cotton growing in Egypt in the near future should be more profitable than it is anywhere else in the world, and this should put us in an extremely strong competitive position

COTTON SHIPMENTS

Total shipments 1927-28	Total shipments 1928-29	Shippers	England	U S A.	France	Italy	Germany	Russia
67,809	95,375	Carver Brothers & Co., Ltd ..	10,198	33,010	16,355	10,525	4,662	7,630
64,200	86,746	Peel & Co., Ltd.	33,730	21,014	10,281	4,005	1,094	3,850
47,725	65,489	Choremi Benachi & Co. .. .	10,999	14,120	1,548	2,980	647	17,901
51,981	58,312	Alexandria Commercial Cy. (S.A.)	26,701	9,204	1,898	9,077	1,171	2,590
30,883	44,755	Egyptian Produce Trading Cy. .. .	10,144	15,155	4,762	30	3,816	8,084
25,477	41,284	Cicurel & Barda	7,587	7,965	10,177	765	196	65
36,847	39,595	Planta, J. & Co.	12,341	4,725	2,167	5,411	1,506	
36,388	38,185	Reinhart & Co. . .	3,156	1,381	10,125	1,715	2,180	
27,234	37,006	Cotton Export Cy. .	6,167	13,985	4,176	2,225	121	
18,556	33,829	Eastern (The) Export Cy.	10,876	8,500	1,330	340	2,149	
25,668	28,315	Andritsakis, A. M. & Co	12,083	6,642	539	3,153	180	
40,381	25,238	Union Cotton Cy. of Alexandria .	3,472	3,338	3,588	6,730	-	7,610
10,546	24,217	British Eg. Cot. Co., Ltd. . ..	19,067	1,295	100	705	-	
24,202	23,994	Salvago, C. M. & Co. .	8,707	5,950	3,651	3,801	240	
17,500	23,561	Rolo, J. & Co .	10,375	3,009	7,838	832	247	
17,712	21,957	Coury & Co. .	4,543	4,752	7,312	123	2,460	
20,207	20,213	Fenderl & Co	1,112	3,895	3,676	2,276	3,202	
16,145	19,620	Sarris, Maison G. D.	12,282	3,511	2,447	660	300	
17,783	19,078	Andres & Co.	518	1,135	870	560	12,005	3,240
13,276	18,713	Kupper, H. .	1,681	760	5,071	2,231	1,816	10
18,302	17,523	Joannidis, J. G. & Co . .	6,893	3,250	1,630		690	
8,341	17,297	Egyptian and Sudan Cotton Trading Co	8,158	4,155	1,282	104	688	175
19,956	16,976	Pinto & Co. . .	7,897	1,290	2,113	4,811	30	
12,074	16,782	Lindemann & Co.		611			7,126	3,211
12,330	15,274	Alby, Albert & Co	2,881	1,675	5,418	2,585	1,575	
10,129	14,956	Gregusci, C. & Co	1,901	2,550	3,380	125	2,310	2,330
12,084	14,834	Ahmed, A. Farghaly Bey	12,055	2,250	520		-	-
12,485	14,173	Getty, W. & Co	1,565	100	5,022	1,410	1,951	
12,474	12,609	Upper and Lower Egypt Cotton Trading	4,487	501	5,116	1,805	- -	
10,385	12,345	Escher, W. .	390	-	583	785	8,592	10
13,577	11,981	Casulli, Maison N. G. . .	3,572	2,575	357	150	1,762	
14,171	11,853	Japan Cotton Trading Cy	150			-		
11,746	10,698	Huri, N. & Co. .. .	7,824	2 250		210	151	
5,838	8,755	Hirzel & Co. .	5,160	250	1,929			
3,463	8,698	Anglo Continen. Cotton Cy	4,056		2,312	2,095	150	
7,394	7,669	Straftis Brothers, T. G. ..	3,178	400	2,391	750	285	
5,261	7,611	Comptoir Cotonnier d'Eg.	5,169		2,442			
6,635	7,479	Daniel Pasquinelli & Co. .	4,198	585	1,392			
1,446	7,016	Debbas, Lévy & Co. .	4,832	225	132	100	1,640	
6,138	6,518	Psomadellis & Co. .	5,953		65	260	100	
8,220	5,917	Exarchou, J. & Co.	5,907					
4,032	5,593	Caculli, M. S. & Co.	5,442	5	116	30		
3,884	5,445	Societe Cotonnière d'Egypte	5,435					
3,744	5,027	Joakimoglou, C. Z. & Co	2,214	50	1,365	438	270	
12,004	3,980	Egyptian Cotton Company	3,740		159		60	
3,511	3,917	Francis, Lévy & Co. .	2,951		858	35	23	
3,798	3,714	Elia & Bibace .. .	3,714					
6,195	3,630	Riches, Duckworth & Co.	3,630					
3,088	3,528	Anglo-Egyptian Cotton Trading Cy	2,938		130	100	360	
989	3,509	Moursi Bros. ..	2,161		159			
3,055	3,160	Bower, W. & Son (Alexandria) .	2,396		1,000		61	
4,688	3,089	Cambas, P. & Co. .	2,155		35	840	34	
4,186	2,935	Aghion Freres	1,782		1,153			
218	2,515	Gill & Co.	861	1,654				
—	2,027	Aghion, Riquez & Co .	1,530		497			
—	1,204	Delta Cotton Export Cy.	463			646		
801	1,106	Wahba Barsoum & Co.	1,031		75			
509	1,088	Kafr-el-Zayat Cotton Cy.	1,088					
53	700	Barclays Bank (D. C. & O.)	100	600				
—	542	Levy Rossano & Co.	490		51			
633	407	Labib Ibrahim & Co. .	407					
6,503	390	Barki, Behor, Co.	105	25	210	50		
40	331	Gounaropoulo, D. J. & Co. .	331					
2,610	283	Eg. Cotton Ginners and Exporters S.A.	168		30			
1.020	280	Banque d'Orient	280					
—	220	Mohamed El Wakil Pacha	220					
—	139	Boulad & Co.	—		66	73		
271	137	Banque Misr	137		-			
333	126	Banca Commerc. Italiana	—	-	126	-		
—	113	Moursi, M. & Co.	33	—	5	--	-	
5,673	75	Sidi, D. & Co.	75	—	-	-		-
209	10	Deutsche Orientbank, A.G. .	10	-	-			
10,881	4,402	Various	3,255	-	809		30	-
005,945	1,076,368	Total .. .	369,413	191,350	143,857	75,606	66,513	56,739

FROM EGYPT, 1928-29

Switzerland	Japan	Spain	Czecho-Slovakia	Poland	Belgium	Austria	India and China	Lithuania	Hungary	Portugal	Holland	Greece, Syria and Turkey	Sweden	Various
1,106	275	1,301	265	75		625	180		25	50		—	--	—
510	3,750	6,735	825	60	32	120	100	30	50	30	180		—	-
6,133		578	6,771	240	232	200			122			--	-	18
481	5,175	-			750	895	200				-	-	—	170
150		1,271	937	130	175				50			21	--	
2,431	5,435	1,202	144	2,220	1,050	1,300	30	335	-		-	82	-	--
3,210		1,086	3,052		2,865	—				200	2	--		
3,685	11,500	330	612	1,145	--	1,319	705		—		272	—	—	--
1,740	2,902	1,200	525	175	900	350	200	1,940	175	150		25	—	50
1,280		70		75					50	—		-		150
3,478		172	244	200	212	1,050	—	—	62	-	—	—	-	—
210				100	160			-	--	—			—	-
		50									-	-		—
270		1,300					-		75	-		-	-	-
		1,260								-		-	-	
1,153		450	125	150	557						30	—	--	2
821	400	885	645	1,221	80			-		—	-	-	-	-
330						90					-			
625		125												
3,701	1,980	270		384	10	30	700		36		30		-	
1,320			1,102		180	50			108		-			
602		1,280	300	175	30	205	29		104			--	10	—
355		180					—							
3,091			2,144	30		120	18		108				17	
1,110			30							-			—	-
630		1,305		200			150		50	25		-	—	
	-													—
3,902		55	36		45		-				—	57	-	--
--	600									100		—	-	-
1,292	300	110	217			36							-	-
1,350		750	965	200	-	275				25		-	-	—
-	11,503						200						--	-
			-				-		--	—	60	3	200	-
1,416								-		—	—	—	-	-
60							25	-		--	-			-
-		550		55	60					-			-	--
-											--		-	—
—		-		.	792					200		.	12	—
61		26										-		—
30							50				60		-	-
-					-		—			.		10	—	--
-													-	
-							10	-					—	
90			600							-				—
											.	21		-
					50								-	
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														-
		1,136			50							-	--	
												25		
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			95								—		—	
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		50			35				--			-		
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-	—	-	--	-	75	-	-	—	—	--	—	—	—	—
	—	-	-	—	—	—	—	—	—	--	—	—	—	—
—	—	.	-	--	-	—	—	—	—	—	—	—	—	—
--	-	-			19	--	—	--	-		—	289	—	—
47,043	43,820	27,380	21,961	8,835	8,359	6,995	2,597	2,305	1,015	780	684	534	239	390

MARKET REPORTS.

Messrs. Reinhart & Co., Ltd., Manchester, inform us that they received, on October 30, 1929, the following cable:—

> "Sakellaridis depressed owing to fear November tenders in consequence of small demand from spinners, large short interest, present prices seem low enough, would advise spinners to buy.
>
> Uppers. Very good demand for all styles, think demand for consumption will probably increase provided actual difference between Ashmouni and American continues."

Messrs. J. G. Joannides & Co., Alexandria, in their weekly market report, dated 30th October, write as follows with reference to Government intervention on the Egyptian cotton market:—

"A conference of the leading exporters has been called by the Government to discuss plans for meeting the present depreciated situation of Egyptian cotton.

Whilst in principle opposed to all Government immixion in the free conduct of trade, we cannot help deploring such ideas, especially in present circumstances. The only hope of selling our enormous crop and carry-over lies in its being offered to consumption at the price which the law of demand and supply will eventually fix. Any other remedy will only serve the purpose of Egypt's competitors (the Sudan, Peru, Mississippi staples, etc.), and its effect will be seen in large carry-overs, and the burden of such mistakes will be felt when we come to dispose of next year's cotton."

Messrs. Reinhart & Co., Alexandria, under date 1st November, write as follows:—

"The chaotic conditions on the stock markets of the United States have had a disturbing effect also on cotton markets and business in general. The demand from spinners has been slack, and prices have dropped to levels which mean great hardship to farmers owing to the high rents they have to pay to owners. The Government, therefore, have recently received innumerable petitions from the Agricultural Syndicate and from individuals to take immediate action to stop a further decline and consequent ruin of the farmer. The Prime Minister invited a number of leading cotton merchants and growers to a meeting on October 31 in order to discuss the attitude to be adopted.

Mustapha Maher Pasha, the Minister of Finance, has stated that the Government will do all in its power to defend cotton prices, but, opinions having been divided, no decided plan was recommended so far. It is, however, believed that the Ministry will favour a stabilization scheme, buying futures at a certain level, but selling out again in case of a moderate advance. For Sakellaridis, figures of $27 for purchases and $30 for liquidation, for Uppers $18 and $20 respectively, have been mentioned.

The mere discussion of this scheme has had a salutary effect on our market, as speculative bear attacks have ceased for the present. The short interest is considered large, and bears have been covering the last few days. There exists besides a heavy straddle position between Ashmouni and Sakellardis, the undoing of which may cause a renewed widening of the parity between the two growths.

The staple of new crop Sakellaridis being considered better than of old crop, November futures have lately been deteriorated to the extent of £1 below January. With the tenders out of the way, this large difference is bound to disappear. In the meantime spot purchases have been stimulated, but with the effect that premiums have become firmer, to outbalance the large difference between January and November.

Ashmouni is somewhat weak at present owing to the abovementioned undoing of straddles, by selling Ashmouni and buying Sakellaridis. The U.S.A., our most important customers for Uppers, have been practically out of the market so far this season.

The reduction of the London discount rate to 6 per cent. will have a stimulating effect.

Our market seems to have overcome the worst, and we recommend our friends to cover their requirements."

EGYPTIAN COTTON CROP FORECAST FOR 1929.

The preliminary figures for 1929 issued by the Egyptian Ministry of Agriculture, with final ginnings for the two previous seasons, are:—

	Sakellaridis	Other Varieties	Totals
1929–30—			
*Crop (cantars)	2,502,992	5,341,877	7,844,869
Area (feddans)	847,950	993,528	1,841,478
1928–29—			
Crop (cantars)	2,533,307	5,313,845	7,847,152
Area (feddans)	799,523	938,949	1,738,472
1927–28—			
Crop (cantars)	2,362,999	3,702.928	6,065,927
Area (feddans)	795,740	720,450	1,516,199

* First estimate.

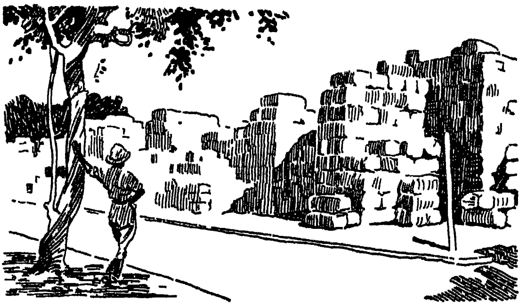
SUMMARY OF MARKET REPORTS.

The various reports received at this office point to a satisfactory progress of the crop. The high level in the Nile has not caused any serious flood damage, nor is there any complaint to hand as regards damage through infiltration.

The first Government estimate of the crop was 7,845,000 cantars, plus about a quarter-million cantars Scarto.

Owing to the Government's habit of underestimating, the size of crop is generally believed to be well over 8 million cantars, some houses holding out the hope of 8½. The Sakel crop is likely to reach 2¾ millions.

The most recent crop estimate of the Alexandria General Produce Association is stated to be 8 million cantars.



East Indian Cotton.

First Cotton Crop Forecast, 1929-30

This forecast is based upon reports on the condition of the cotton crop at the end of July or early August. The reports do not, as will be seen from the detailed notes below, relate to the entire cotton area of India, but to only 77 per cent. of the total.

The area sown is at present estimated at 15,885,000 acres this year, as compared with 15,201,000 acres (revised) at the corresponding time last year, or an increase of 4 per cent.

Weather conditions at sowing time were not quite favourable, but the present condition of the crop, on the whole, is reported to be generally good.

Detailed figures for the Provinces and States are as follows:—

	Acres (thousands)		
Provinces and States	1929-30	1928-29	1927-28
Bombay-Deccan (including Indian States)	1,623	1,665	1,777
Central Provinces and Berar	5,104	4,810	4,840
Madras	234	220	172
Punjab (including Indian States)	2,301	2,190	2,249
United Provinces (including Rampur State)	736	548	772
Burma	324	354	400
Bengal (including Indian States)	76	77	77
Bihar and Orissa	65	75	76
Assam	43	45	45
Ajmer-Merwara	10	17	12
North-West Frontier Province	12	12	21
Delhi	2	1	3
Hyderabad	2,613	2,653	2,222
Central India	1,197	*1,184	1,115
Baroda	430	383	410
Gwalior	645	579	620
Rajputana	439	*370	338
Mysore	11	9	7
Total	15,885	*15,201	15,156

* Revised

A statement showing the present estimates of area classified according to the recognised trade descriptions of cotton is given below:—

Descriptions of cotton	Acres (thousands) 1929–30	1928–29
Oomras -		
Khandesh	1,136	1,378
Central India	1,842	[1] 1,673
Barsi and Nagar†	2,857	2,844
Hyderabad Gaorani		
Berar	3,341	3,247
Central Provinces	1,763	1,563
Total	11,139	[1] 10,795
Dholleras	155	101
Bengal-Sind —		
United Provinces	756	548
Rajputana	449	[1] 387
Sind-Punjab	1,451	1,319
Others	70	80
Total	2,726	[1] 2,334
American-Punjab	864	884
Broach	275	282
Coompta-Dharwars	32	26
Westerns and Northerns	47	163
Cocanadas	20	24
Tinnevellies	170	102
Salems		
Cambodias		
Comillas, Burmas, and other sorts	457	490
Total	15,885	[1] 15,201

[1] Revised. † Includes cotton grown in non-Government areas of the Hyderabad States.

CROP ESTIMATE.

Messrs. Ralli Brothers issue their estimate of the Indian crop as follows:—

EAST INDIAN COTTON ESTIMATES (IN THOUSANDS)

SEASON: September/August (bales of 400 lbs.)	1929/30	1928/29	1927/28	1926/27	1925/26
RECEIPTS:	Provisional	Present	Final	Final	Final
Oomras	3,300	3,318	2,700	2,321	2,372
Dholleras	250	250	420	328	432
Bengal/Sind	1,000	1,173	1,050	884	1,205
American Surats	550	448	402	472	607
Broach/Surti	450	337	400	386	426
Comptah/Dharwar	325	318	220	188	274
Western/Northern	325	335	260	190	316
Cocanada	50	48	45	52	61
Tinnevelly	250	237	210	183	185
Cambodia	150	153	116	98	135
Comilla styles	30	27	41	46	48
Rangoon and sundries	70	70	73	70	70
TOTAL, including the opening balance in India	6,750	6,714	5,937	5,218	6,131
HANDLOOMS, ETC.	750	750	750	750	750
	7,500	7,464	6,687	5,968	6,881

Season. September/August (bales of 400 lbs.)	1929/30	1928/29	1927/28	1926/27	1925/26
RECEIPTS:	Provisional	Present	Final	Final	Final
SUPPLIES from India:					
Of which opening balance in India	890	957	348	398	311
YIELD:					
Our estimate	6,610	6,507	6,339	5,570	6,570
Government's	*	5,638	5,871	4,973	6,038
ACREAGE:					
Estimate of final	26,500	25,874	26,000	25,500	27,960
DISTRIBUTION:					
Europe, etc	2,000	1,735	1,526	958	1,205
Japan and China	2,500	2,209	1,653	1,842	2,511
Indian mills	2,000	1,880	1,801	2,070	2,017
Handlooms, etc.	750	750	750	750	750
TOTAL TAKINGS:	7,250	6,574	5,730	5,620	6,483
Supplies, as above	7,500	7,464	6,687	5,968	6,881
CLOSING SURPLUS IN INDIA ..	250	890	957	348	398
ESTIMATED WORLD SUPPLIES (including visible and invisible at the season's opening).					
Opening	2,700	2,550	1,750	2,350	2,350
Yield	6,600	6,507	6,339	5,570	6,570
TOTAL	9,300	9,057	8,089	7,920	8,920
MILL CONSUMPTIONS (Aug./July) as per the International Cotton Federation:					
Europe, etc.	—	1,368	1,110	966	1,261
Japan, China, etc.	—	1,930	1,573	2,043	2,296
Indian mills	—	1,880	1,840	2,188	2,015
ACTUAL BALES:					
Excluding Indian handlooms, etc.	—	5,178	4,525	5,197	5,572
Add for handlooms and weight basis	—	825	825	825	825
Sundry consumptions and losses	—	350	200	150	180
TOTAL CONSUMPTION in bales of 400 lbs.	—	6,353	5,548	6,172	6,577
INDIAN V. AMERICAN, calculated on Indian basis bales and American actual bales:					
Ratios of supplies	49·6%	47·1%	39·4%	33·4%	44·8%
Ratios of consumption	47·5%	41·2%	35·5%	38·6%	47·0%

* Not yet published.

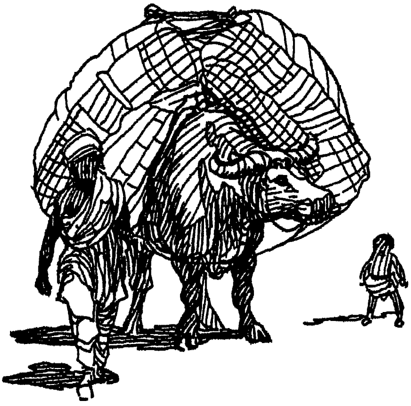
In putting forward our above estimate of the Indian crop, we wish to emphasize that our figures are only preliminary. The crop is at an advanced stage, and promises very well; so late in the growing season no actual improvement is possible in the early crops (which are the biggest), i.e., Beng/Sind, Amer/Sur and Oomras, but only corrections to the current estimates. On the other hand, however, unseasonable weather in October and November can result in substantial disappointments (as happened in 1926-27). But so far our expectations are for very large supplies.

The Bengal/Sind crop is still a matter of greater uncertainty; the recent floods in Sind are believed to have destroyed a large portion (which we place at 21 per cent. at present) of the crop there. But it is not possible yet to estimate the damage with any accuracy; it may be exaggerated or underestimated. At any rate it is unfortunate in view of the present scarcity of roughish and rough cotton.

On the side of the distribution and consumption, as buyers are giving more and more attention to Indians at their present cheap parity, we expect a very considerable increase, say up to a total of 7¼ millions. More than the usual quantity has been going into channels which are not covered by the figures of Cotton Mills consumption of Indian cotton.

In comparing the supplies and consumption of Indians with those of Americans, we are taking at present for the latter supplies of 18¾ millions and consumption of 15¼ millions. It will be noticed from the figures given (calculated on this basis) that the Indian proportion of supplies works out slightly higher than that of the consumption, although the difference between the two percentages is materially reduced from that shown by last season's figures.

Attention is invited to the resolution adopted at the Barcelona Cotton Congress relating to the enforcement of the Cotton Ginning and Pressing Factories Act and the falling-off in quality of Punjab-American cotton (see p. 47).



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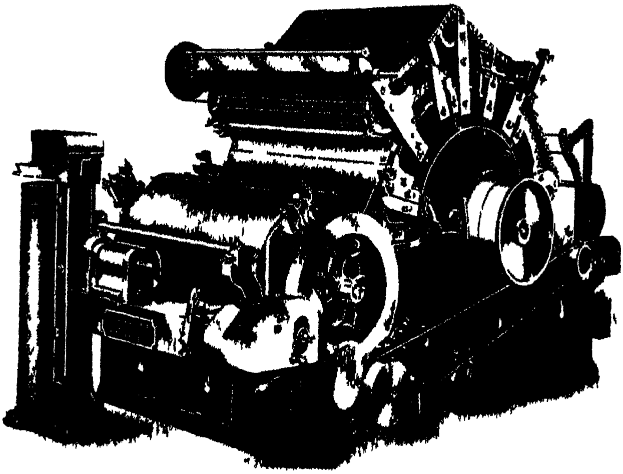

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Technical Section

Automatic Looms.

Analysis of Returns received by the International Cotton Federation from Cotton Manufacturers in various countries. Paper by Mr. CASPAR JENNY, Ziegelbrücke, Switzerland, prepared for the XIV *International Cotton Congress at Barcelona, September* 18*th to* 22*nd*, 1929.

No problem engages the European cotton manufacturers at the present time more earnestly than the means of reducing the cost of weaving. The International Cotton Federation issued last winter a questionnaire amongst the European and American weaving mills in order to collect direct information from the experiences obtained with automatic looms, and we must acknowledge gratefully the large response of non-members, viz.: U.S.A. manufacturers who in this way have supplied a great deal of very excellent material, whilst one cannot help but criticize somewhat the lukewarm co-operation on the part of the European manufacturers, which seems to be in harmony with the usual secrecy adopted in most commercial matters on this side of the Atlantic Ocean. Germany, France and Italy have not made any returns, whilst there are some interesting facts revealed from the few questionnaires from England and several small countries.

A number of yarn samples from U.S.A. as used in automatic weaving have also been examined. We must state at once that these yarns have no better appearance than the European yarns; on the contrary, they are not as well carded but are more uniform in strength, due no doubt to the American customary use of double roving. These American yarns have, for our conception, too much twist, but it must be admitted that by these means less breakage arises in the weft, and consequently the weaver is enabled to attend to a larger number of looms.

Mass production is very important. Very large mills use only one count for all warps and weft; the closeness of the texture is constant throughout, from which enormous advantages result; this is particularly applicable to surgical dressing material and to light and medium printers.

It is surprising that in U.S.A. the number of picks per minute is considerably less than in Europe, often 10 to 15 per cent., but, on the contrary, the cops are rather larger, mostly with 6½-in. lift, and their diameter is also bigger than in Europe. Weft cops in U.S.A. can be made thicker solely on account of the stronger twist of the yarn. Our clientèle is much more spoilt than in U.S.A., as our people simply will not buy cloth made out of hard-twisted yarn, and we are therefore forced to try to manage with a yarn that has less twist. This appears quite feasible if we use a more uniform yarn. As raised goods (flannelettes) cannot be produced out of hard-twisted yarns they are not made to any great extent in U.S.A.

As has been indicated previously, the number of picks per minute in the U.S.A. are mostly 10 to 15 per cent. less than those customary in the European weaving mills fitted up with automatic looms. For a loom producing a 36-in. cloth, automatic looms are expected to run in Europe 180 picks per minue, whilst in the U.S.A. 160 to 165 picks per minute are sufficient, which of course is an advantage for the mechanism of the looms. The idea of running the looms slower, and therefore to take less out of the material, is decidedly right. A weaving mill which produces surgical dressings, 40 ins. wide, 20 warp threads by 16 weft threads per English inch, with 30's warp and 40's weft, states that the number of persons engaged per 100 looms is five, inclusive of foreman, oiler, cleaner, etc. As the efficiency of the automatic loom is stated to be 98 per cent., the production may be compared with 87 ordinary looms having 200 picks per minute and 90 per cent. efficiency. The European automatic loom would hardly reach 98 per cent. efficiency with the usual 180 picks per minute; its efficiency would be a few percentages below, so that there would not be a much higher production.

The replies of the American mills relating to the use of the weft-feeler are interesting. It is evident that the number of looms which may be run without weft-feeler is exceedingly great. This shows that in U.S.A. there are much larger possibilities of selling goods produced on the cheapest mass-production way, much more so than on the Continent of Europe. The number of looms worked varies very considerably. The maximum is 113 for one weaver and a battery filler. It is true that there are only 93,000 warp threads in these looms.

For better class cloths the weaver has to watch on his looms anything between 40,000 to 60,000 warp threads, in which case (at least where coarse weft is used) a battery filler must be employed. For light goods, plain weave, the number of looms per weaver has in exceptional cases more than 100,000 warp threads; in this case always medium counts of 30's for warp are used, and at the outside medium construction. One weaving mill, which has almost exclusively narrow looms and produces better class cloth, states that the number of operatives per 100 looms is 11, and the number of picks 160, the efficiency 90. Another mill which produces exclusively wide goods, 68 warp and 72 weft threads per inch, on 90-in. wide looms, states that the number of persons employed per 100 looms is only 8½ for the whole weaving shed, one weaver having to look after 197,000 threads, with 108 picks per minute per loom.

As stated above, it seems that the average of one weaver's work is to watch over 40,000 to 70,000 threads normally, i.e., about the same as in the European mills, provided, of course, that it is not a cloth with fine yarn of about 30's warp and corresponding weft. A weaving shed producing fine goods states that it requires per 100 looms in the whole shed eight persons, namely: six weavers, a tackler and a cleaner. Evidently there is no magazine filler, oiler, etc. The system of employing a battery filler seems certainly right, as it enables the more nimble operative to be engaged exclusively for work requiring quickness and intelligence. In the very large automatic weaving sheds we find that besides the manager and first foreman there is engaged a specialist for examining automatic looms; this is a man who is not only a weaving master but also a mechanic; such an arrangement seems very desirable. In smaller weaving sheds where there is only a foreman and an understudy, it is desirable that the foreman should have such a specialist and that the different sections in charge of the weaving master are made larger.

The re-winding of weft yarn is customary only in fine weaving, and, especially in the United States, is used very seldom. Re-winding pays for itself in case of very coarse, soft yarns, and of yarns over 50's. For automatic looms with cop-changing arrangements we should use only ring-weft yarns.

Very praiseworthy remarks are being made about the midget feeler, because it reduces considerably waste. As regards the quantity of the weft-waste, most of the views coincide that the weft-waste in automatic looms is not considerably greater than with ordinary looms, and it certainly does not come into account when we consider the other advantages of the automatic loom. Most of the replies state that there is very little more waste; many others say "about the same as with ordinary looms"; and, finally, some state about 10 per cent., more or less. Others state again that the waste is 150 to 200 per cent. of the ordinary looms. It seems to me that the weft-waste should fluctuate between 1 and 3 per cent.

The answers as regards the cleaning of the looms vary considerably. In many places the loom is cleaned when the warp is finished; in others it is cleaned once a week by means of compressed air, and some state that the cleaning takes place daily by means of compressed air.

The Northrop system is being preferred above all others, at least for coarse and medium cloths. The shuttle-changing loom has the undoubted advantage that mule yarn may be used, but it is certain that this loom requires more helping hands, and it is a question whether the use of so many shuttles does not affect very disadvantageously the running of the loom; the wear and tear on the shuttle must be considerable.

All so-called attachments must be used with great caution, and should be fitted only to looms which are still in first-class condition, and anyone who puts an attachment on an overpick-motion-loom is not likely to have pleasant experiences; according to the views and experience of the writer even the best attachments will, in the long run, stand him dearer than the purchase of a new automatic loom at the outset. It is very strongly recommended that all new looms should be driven by an individual motor (with cog wheel) as this causes a more uniform running and consequently a more perfect weave.

There is no doubt whatsoever that any weaving shed whose owner does not intend to give up business will have to buy automatic looms, except in the case where some few specialities are being produced. The automatic loom is suitable even for many first-class quality goods, and, according to my opinion, the Northrop system is preferable.

The experiences obtained in the United States agree entirely

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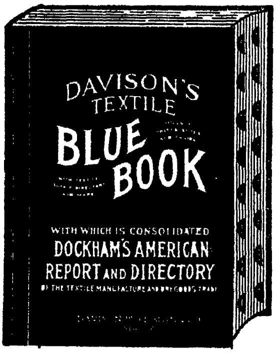

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with those gained in the most modern European automatic weaving mills, and if the results on this side to-day are not yet the same as across the ocean, this is attributable to the lack of a proper mass-production system. Where and if mass production can be introduced, must be decided by each owner of a weaving shed; a very good class of work can be obtained on the automatic looms with a great saving, even where mass production does not exist, though, of course, the advantage is not so high. Anyone who can run 100 or 200 looms with the same kind of cloth comes very near to the cheap mass production. This is a compromise which could be adopted in most countries.

The latest automatic looms are so excellent in every way that their use becomes only a commercial and organisatorial question. In order to use the automatic looms to the best advantage in coarse and medium goods there ought to be a spinning mill combined with the weaving shed.

Analysis of returns received by the International Federation of Master Cotton Spinners' and Manufacturers' Associations. Paper prepared by Mr. THOMAS ASHURST, Secretary of The Cotton Spinners and Manufacturers' Association, Manchester, for the Barcelona Cotton Congress.

One of the outstanding questions which is at present exercising the minds of directors and the management of the textile industry is how to reduce the production costs to the level at which the world's markets will again absorb the production. The reports received from the textile producing countries, apart from Japan, U.S.A. and possibly Italy, show a serious falling-off of orders, yet the world consumption of cotton increases. The uses for cotton, particularly for industrial purposes, apart from being made up into cloth, are many and varied and to some extent this accounts for the increased consumption. The main cause for the lessened demand for cotton textile fabrics is that since 1919 productive costs have in most countries risen to such heights, and the result of this increased cost has been that the peoples of the world are purchasing less quantities than formerly.

Whatever the cause of the falling-off in the demand for cotton cloth the effect has been a greater amount of research into the causes of high productive costs, and this in turn has led to a searching enquiry into the merits and demerits of the automatic loom. The International Federation has rendered a signal service in issuing to the various countries a Questionnaire—as per copy herewith—and the replies received are extraordinarily interesting.

The returns from America appear to fall into very defined sections. That section dealing with coarse or low-grade cloths runs its looms at a slow speed, the weavers attend to a comparatively small number of looms and do their own battery filling. The loss in waste is heavy, but the efficiency is good; in many cases this is stated to be 95 per cent. to 98 per cent., but 80 per cent. to 85 per cent. is the general average.

In the second section, which deals with the better class of plain woven goods, there is a larger variation of the number of looms to a weaver, but it would appear from the returns that the abnormal number of looms attended by one person, of which we have often been told about, is very rare. It is evident from the returns that there is a limit to the physical capacity of the human factor beyond which it is unsafe to go. In this section ring warp is almost exclusively used and ring-spun weft for filling. The looms are run at moderate speed and the efficiency generally is slightly better than in the coarser section, though an examination of the details of the answers to the Questionnaire leave one with the impression that the efficiency figures do not err on the side of modesty.

We now come to the finer section, that is, the section making such goods as cambrics, lawns and fancies of many descriptions, and in going through the returns of this section one is forced to the conclusion that these mills are the best equipped and best managed of the whole of the American cotton textile industry. The usual number of looms to a weaver is moderate, anything from 16 to 30, according to sorts of cloth woven, though there are one or two isolated cases where the number of looms to a weaver is stated to be much higher, but on again examining the details I am inclined to the belief that in these latter cases there are special features attached to the work of those who assist the weaver and the figure may be somewhat misleading; they should be regarded with caution, as there are probably other helpers who have not been mentioned in the returns. The looms do not run at excessive speeds, the waste from the filling is not excessive where feelers are used, and not too bad where no feeler is employed. Ring warp is generally used and filling or weft varies considerably in counts, contrary to other sections.

There seems to be a great preference in America for the Draper-Northrop and Stafford looms, and as these have had an extended trial by them we must conclude that these two makes have justified themselves.

It should be remembered that America is the home of the ring spinning frame, and this fact, along with the knowledge that ring-spun warp is much more satisfactory for use in the automatic loom than mule-spun warp, accounts for the extensive use of the former. The number of mule spindles in America is not large and is diminishing. It is not advisable to use mule-spun warp owing to its softer nature, and the need for the use of warp stop motions in all classes of automatic looms practically prohibits its use. With the weft or filling it is different; some of the ring-spun wefts which have been received from America, upon examination, give the soft feel that is so characteristic of mule-spun yarns and will no doubt finish up in the cloth almost as good as mule yarn.

Summing up the replies one is led to doubt the authenticity of the report often made that weavers attend to an abnormal number of looms. It has been stated that there are cases where weavers attend to 80 looms each, and in one extreme case the number is stated to be 100. These refer to weaving surgical dressing material which is a cloth with a low pick and reed. The replies received to the questionnaire do not relate to such cloths.

The cotton-manufacturing industry of America is to be congratulated upon the frankness with which they have answered the questions put to them, and it is all the more to their credit that they have answered so fully seeing that their association is not a member of the International Federation.

Canada follows mostly on the lines adopted in America. They

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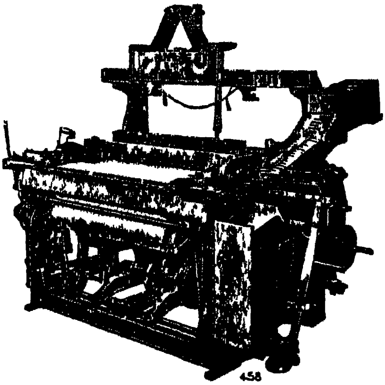

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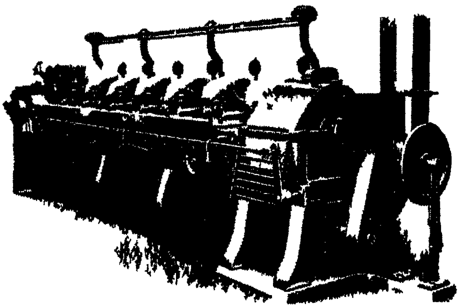

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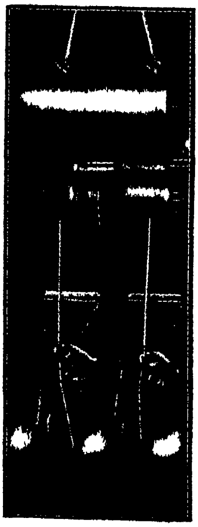

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make similar classes of goods and they give the weaver about the same number of looms to look after, viz , 16 to 30, according to class of cloth Ring yarns are mostly used and the type of loom adopted is mostly the Draper

The European countries have not responded to the invitation to fill up the questionnaire with the same enthusiasm as the U S A , still the answers received are interesting and well worth studying

Holland, with one exception, is only in the experimental stage The one exception use Northrop, 32 looms to a weaver, the class of cloth made is heavy coarse goods and the loom efficiency is given at 90 per cent , the weft filling is spun on paper tubes, a feeler is used so that the waste is very little more than would be made in an ordinary loom The speed of the looms is very moderate

Finland uses the Northrop loom exclusively, weavers mind very few looms, mostly 8 to 12, and it is stated that the efficiency is only moderate

Norway also uses the Northrop and a moderate number of looms is attended to by one weaver The cloths made are rather low in reed, but the efficiency is stated to be very fair, from 85 per cent to 90 per cent weft feelers are used, but the waste is much heavier than on ordinary looms Usually 12 looms to a weaver, who also fills the battery

Belgium The returns received from Belgium do not give sufficient information upon which to base a general report

Sweden According to the replies received from Sweden the average number of looms to a weaver is about 12, of medium width, the weavers fill their own batteries and the type of loom used is mostly the Northrop, with Ruti in a few instances The work done is good and the efficiency varies from 80 per cent to 90 per cent , weft waste is stated to be rather excessive

Germany Here again, the number of looms to a weaver is given from six to eight, the looms only run at moderate speeds and the class of cloth is medium Efficiency varies from 75 per cent to 80 per cent

Switzerland The replies show that most mills are composed of small units, Ruti loom seems to be the favourite, work is satisfactory, 12 looms to a weaver, 160-180 picks per minute, ring-warp efficiency varies from 65 per cent to 95 per cent The reason for this is not apparent from the information received

Czecho-Slovakia The replies are so very few that it is impossible to treat them as representative and it would not be fair to tabulate and issue them

Poland and Latvia So few replies have been received that the remarks applied to Czecho-Slovakia also apply to these countries

India Whilst sending few replies, one of such replies is interesting, showing that only four looms of 40 inches reed space is attended by one weaver, the efficiency is stated to be 85 per cent , Northrop looms being used The goods made are of the coarser quality and the speed is only moderate, 160-170 picks per minute

England Although this country is reputed to be far behind other countries in the use of automatic looms, the number of mills making returns comes as a surprise With three or four exceptions the units are only small, but it does show that the use of automatic looms in England is more widespread than was generally supposed Of the larger units preference seems to have been given to Northrop looms; their efficiency is quite satisfactory, being about 90 per cent. on the average; the average speed of looms is 180 picks per minute; all classes of cloths are made; the weavers attend to approximately 20 looms each, and waste is stated to be less than on ordinary looms. The Stafford loom has only recently been put on the English market; it is a shuttle-changing loom, and for that reason enjoys a certain reputation amongst users of mule weft, as there is not a severe pull when changing shuttles. A number of looms have the Whittaker attachment, which enables the weaver to attend about 20 looms; the speed varies considerably with this class of loom, and whilst fairly good plain woven cloths are made, it does not seem to have extended to the very fine plain woven goods section.

It does, however, emerge from an analysis of the replies that a very large variety of cloths can be made on automatic looms, but the difference in the cost of production as between such looms and ordinary type of loom was not a subject of the enquiry. It would, however, be a very interesting matter for consideration; perhaps somebody present might be able to give this information relating to one or two cloths. Many people are of the opinion that the cost of production is less on automatic looms than it is on the ordinary type of loom. No one can deny that owing to the greater capital outlay it is almost impossible to run automatic looms profitably if the working hours are restricted to 48 per week. Another feature which prevents the more extensive use of automatic looms in England is the large amount of mule spinning, and the unsuitability of mule twist for use in automatic looms is universally recognized. Of course, in those countries where suitable and sufficient labour has been difficult to obtain, the use of automatic looms has been the only method that could be adopted in order to build up an industry. Even yet there is a demand for cloths of the finer and better qualities which it has not been found possible to make satisfactorily in automatic looms.

As the automatic loom is not in general use in England the writer does not propose to discuss the merits of automatic looms and compare them with the ordinary looms, but many good things can still be said of the ordinary type of loom, not the least of which is that it is simple to understand and manipulate. Until recently it has been able satisfactorily to meet the world's needs, and by many competent authorities it is still regarded as being a long way from relegation to the scrap heap.

The reserved attitude of England towards the automatic loom is due to many causes, one of which is the complex nature of the trade and the great variety of fabrics made, and the separation of the spinning and manufacturing sections. A further factor is that the trade unions have up to recently not been favourable to the adoption of the automatic loom. In view of the unfavourable attitude of the operatives and also on account of the high capital outlay which necessitates running more than 48 hours a week if the looms are to be used economically, the English textile industry has delayed the general adoption of the automatic loom, though it would appear that lately many more English weaving mills are experimenting with the automatic looms, and efforts are now being made to get the trade union restrictions relaxed, so that the introduction of the automatic looms is likely to proceed where suitable conditions exist.

No............

INTERNATIONAL FEDERATION OF MASTER COTTON SPINNERS' AND MANUFACTURERS' ASSOCIATIONS, MANCHESTER.

QUESTIONNAIRE ON AUTOMATIC LOOMS.

The individual answers to this questionnaire will be treated in a strictly confidential manner. Nobody except the General Secretary will know the names of the firms represented by the number in the right-hand corner of this form. This enquiry form must not be signed.

1. How many automatic looms are working in your mill? ... ...

2. How many automatic looms does one weaver attend to? ... ...

3. How many automatic looms does one tackler (loom-fixer) attend to? ...

4. How many looms does one battery filler attend to? ... ...

5. What is the average count of reed? i.e., number of warp ends per inch? ... ...

6. How many picks per minute do your automatic looms make? What reed-space are the looms? ... ...

7. Specify character of cloth, width, counts of warp and weft. Number of threads per square inch ...

8. What loom efficiency do you obtain? ... ...

9. Do you use ring twist (ring warp)? ... ...

Do you use mule twist (mule warp)? ... ...

Do you use ring weft? ... ...

Is this spun on to bobbins which can be used in shuttles? ... ...

What is the lift and diameter of the bobbins? ... ...

10. Are you re-winding the weft (filling)? If so, what is the cost of re-winding per lb.? ... ...

What are the counts of weft? ...

Please give diameter of pirn, lift and length of yarn on pirn ... ...

11. Have your automatic looms a weft-feeler motion? ... ...

12. What additional waste of weft (filling) have you with automatic looms as compared with ordinary looms? (Take the waste on an ordinary loom as 100) ... ...

13. When and how often are the automatic looms cleaned? ... ...

14. How many operatives, in all, do you employ per hundred looms and their detailed work? ... ...

15. To which make of automatic loom do you give preference? ...

As many European manufacturers have frequently expressed the opinion that the cotton yarn used in connection with automatic looms is much superior in quality to the average yarn employed on an ordinary loom in European countries, a number of yarn samples have been obtained by the International Cotton Federation from U.S.A. weaving mills, and these have been tested by the Manchester Chamber of Commerce Testing House, whose report is as follows:

Strength per lea obtained on a Goodbrand machine, driven by power at 1 in. in 5 seconds.

The counts were established after reeling in an atmosphere of normal humidity.

Before testing the samples were exposed in an atmosphere of normal (average) humidity.

The average count was calculated on the total weight of 5 leas.

1 SAMPLE OF YARN (RING TUBE). 27/1.

Strength per lea, average	61·5 lbs.
Count, average	23·8
Turns per inch, single, average	25·6 turns
Direction of Twist	Twist-way
Length of Tube	8·3 inches

Remarks: Of fair average regularity, but considerably below the average strength of a Lancashire-spun warp yarn of 24's count.

1 SAMPLE OF YARN (RING TUBE). 30/1.

Strength per lea, average	56·9 lbs.
Count, average	28·5
Turns per inch, single, average	24·4 turns
Direction of Twist	Twist-way
Length of Tube	7·4 inches

Remarks: Compared with an average Lancashire warp yarn of this count, the sample is less regular, more " bitty," and somewhat below strength.

1 SAMPLE OF YARN (RING TUBE). 29/1.

Strength per lea, average	47·2 lbs.
Count, average	28·0
Turns per inch, single, average	25·7 turns
Direction of Twist	Twist-way
Length of Tube	8·0 inches

Remarks: Of fair average regularity, but considerably below average strength for a warp yarn of this count.

1 SAMPLE OF YARN (RING TUBE). 36/1 WEFT.

Strength per lea, average	69·4 lbs.
Count, average	28·8
Turns per inch, single, average	23·9 turns
Direction of Twist	Twist-way
Length of Tube	8·3 inches

Remarks: A very good yarn, and of satisfactory strength for a Lancashire-spun warp yarn of this count.

1 SAMPLE OF YARN (RING TUBE). 29/1.

Strength per lea, average . . .	50·2 lbs
Count, average	30·3
Turns per inch, single, average ...	26·3 turns
Direction of Twist	Twist-way
Length of Tube	7·3 inches

Remarks: Of good average quality, but somewhat below average strength for a warp yarn of this count.

1 SAMPLE OF YARN (RING TUBE). 30/1.

Strength per lea, average	51·2 lbs.
Count, average	31·8
Turns per inch, single, average ...	26·6 turns
Direction of Twist	Twist-way
Length of Tube	7·4 inches

Remarks: Of average regularity and cleanliness, but slightly below average strength for a warp yarn of this count.

1 SAMPLE OF YARN (RING TUBE). "32/1 FILLING."

Strength per lea, average	51·3 lbs.
Count, average	32·0
Turns per inch, single, average ...	25·2 turns
Direction of Twist	Twist-way
Length of Tube	8·0 inches

Remarks: Of average regularity and cleanliness, but slightly below the average strength for a warp yarn of this count.

1 SAMPLE OF YARN (RING TUBE, YELLOW).

Strength per lea, average	50·9 lbs.
Count, average	31·9
Turns per inch, single, average ...	24·5 turns
Direction of Twist	Twist-way
Length of Tube	8·2 inches
Length of yarn on tube	1,466 yards

Remarks: Of average regularity and cleanliness, but slightly below the average strength for a warp yarn of this count.

1 SAMPLE OF YARN (RING TUBE). 36/1.

Strength per lea, average	37·2 lbs.
Count, average	36·5
Turns per inch, single, average ...	20·3 turns
Direction of Twist	Twist-way
Length of Tube	7·4 inches

Remarks: Not up to the average in respect of regularity and cleanliness, and considerably below average strength for a warp yarn of this count.

1 SAMPLE OF YARN (RING TUBE). 36/1.

Strength per lea, average	40·3 lbs.
Count, average	33·7
Turns per inch, single, average ...	28·7 turns
Direction of Twist	Twist-way
Length of Tube	7·5 inches

Remarks: Of average regularity and cleanliness, but considerably below average strength for a warp yarn of this count.

1 SAMPLE OF YARN (RING TUBE, RED AND BLACK).

Strength per lea, average	49·6 lbs.
Count, average	36·8
Turns per inch, single, average ...	23·2 turns
Direction of Twist	Twist-way
Length of Tube	7·8 inches

Remarks: A good yarn and of satisfactory strength.

Moisture Effects on Strength and Stretch on Sized, Unsized Yarn.

According to a publication of the National Association of Cotton Manufacturers, Boston, Mass., the Departmental Committee on Artificial Humidity in Cotton Cloth Factories, appointed to study the effect of humidity on employees, has made a report that has recently become available.

As a part of the data considered, a series of tests were made on sized and unsized warp yarns from the same beams. The samples were taken from the ordinary production of different mills and were chosen to show a range of quality. Table 1 shows the moisture regain of the yarns, the cotton and the starch for a range of humidities. Table 2 gives the breaking strength and extension of these yarns under a similar range of humidities, while Table 3 gives the corresponding data on the sized yarns. These results conform closely with the findings of other investigators on the unsized yarn where a definite increase in strength follows an increase in the regain due to higher humidities. The effect of humidity on sized yarns, however, has not been studied as carefully; consequently, the figures might tend to create an impression that the yarn decreases in strength with the increase in humidity This, however, is not the case, as the decrease in the strength of the sized yarn is due to loss in the additional strength that the sizing added to the yarn and because of the gradual softening of the starch.

TABLE I.

MOISTURE REGAINS OF SIZED YARNS.

R.H.	50's Combed Sakel	32's Combed Sakel	32's American Carded	32's American Carded	Cotton	Starch
30	4·58	5·56	3·45	3·88	4·20	8·5
50	6·50	7·60	5·25	6·01	5·9	12·3
70	9·57	10·1	8·43	10·62	8·4	16·5
80	10·98	11·1	9·78	13·0	10·3	19·2
100	28·9	29·6	54·2	72·3*	—	—
70	16·6	18·5	61·4	68·9	% size at 70	R.H.
0	15·3	16·7	61·4	65·6	at 0	R.H.

* Mildewed.

TABLE II.

HUMIDITY EFFECT ON UNSIZED YARNS.

Breaking Load in Grams ±2.

R.H.	50's Combed Sakel	32's Combed Sakel	32's American Carded	32's American Carded
30	186·1	207·4	163·9	147·0
50	195·3	233·3	179·0	167·4
70	205·4	243·7	194·9	182·3
85	213·9	246·1	192·1	199·6
92	217·3	252·6	196·8	207·6
100	217·6	251·4	197·3	214·6
Av. 65·4	203·6	236·6	185·3	180·8

Extension in Millimetres + 0·2.

R.H.	50's Combed Sakel	32's Combed Sakel	32's American Carded	32's American Carded
30	22·9	24·6	20·1	18·7
50	28·7	30·9	26·1	25·5
70	30·7	33·5	31·5	30·2
85	35·4	37·8	34·7	34·6
92	35·3	37·4	34·5	34·4
100	34·5	38·8	35·7	35·0
Av. 65·4	30·6	32·8	29·4	28·7

TABLE III.

HUMIDITY EFFECT ON SIZED YARNS.

Breaking Load in Grams +2.

R.H.	50's Combed Sakel	32's Combed Sakel	32's American Carded	32's American Carded
0	—	—	—	240·3
27	221·3	298·7	229·1	238·1
53	224·9	290·7	212·7	250·9
69	227·7	295·2	213·5	255·4
78	228·7	291·8	217·9	258·1
85	221·2	281·2	212·3	253·1
94	217·6	280·0	203·7	246·2
Wet	203·4	260·5	205·2	231·8
Av. 67·7	223·6	289·6	214·9	250·3

Extension in Millimetres + 0·2.

R.H.	50's Combed Sakel	32's Combed Sakel	32's American Carded	32's American Carded
0	—	—	—	11·7
27	15·17	17·39	14·92	15·43
53	16·10	18·69	17·27	18·20
69	19·52	22·91	24·67	23·63
78	21·32	25·90	28·48	26·54
85	24·74	28·59	31·22	30·73
94	29·64	33·23	36·45	34·13
Wet	33·76	38·43	38·26	36·14
Av. 67·7	21·05	24·45	25·50	24·78

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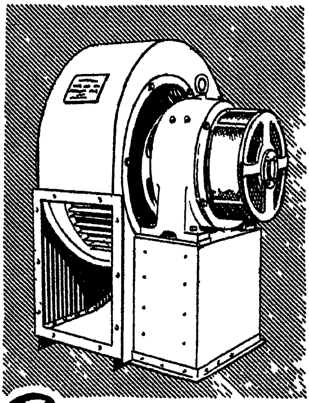

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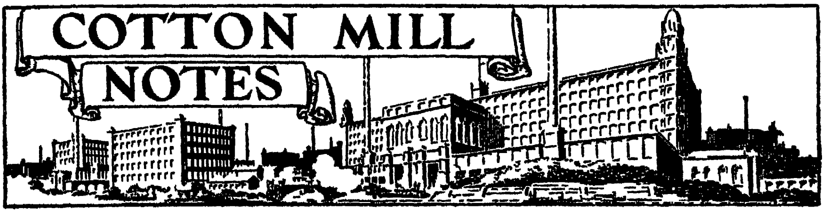

Mexican Cotton Industry.

On page 683 of the July issue of the INTERNATIONAL COTTON BULLETIN we published a report on the cotton industry of Mexico. We now quote from an article published in a recent issue of *Commerce Reports* by E. A. Mann, of the U.S. Textile Division, on the conditions in the Mexican cotton industry during the first six months of this year.

The depression in the Mexican textile industry, which prevailed throughout 1928, showed no signs of abatement during the first six months of 1929. Since that time the position of the industry has improved considerably. Production and sales during July are reported 15 to 20 per cent. in excess of those of June. During 1928 the cotton industry attempted to reduce stocks on hand by suspending or curtailing operations, a policy which was continued until the end of March, when the arbitral decision of President Portes Gil required all textile mills to resume normal production within 60 days. In some cases mill owners failed to comply with this order, and as a consequence had difficulties with their employees. According to a statement issued in May, 1929, by the Ministry of Industry, Commerce and Labour, 11 cotton mills were closed at that time, and shortly thereafter two more mills in the State of Nuevo Leon were reported to have shut down.

LOCATION OF MEXICAN COTTON MILLS.

Cotton mills are found throughout Mexico, but the majority are located in the central part of the country. The Mexican Bureau of Special Taxes issued a statement showing the location of the individual cotton and wool mills, both active and idle, for 1928. The State of Puebla led with 49 cotton mills, having 220,340 spindles, 8,511 looms, 62 knitting machines, and 12 printing machines reported active. Next in importance was the Federal District with 22 mills operating. These had 107,393 spindles, 3,388 looms, 569 knitting machines, and 16 printing machines. The State of Vera Cruz on the east coast followed with 11 active mills, which had 171,296 spindles, 6,784 looms, and 11 printing machines. The State of Jalisco, on the west central coast, had five active mills with 48,910 spindles, 1,904 looms, and five printing machines. Other important centres of cotton manufacture are the States of Mexico, Tlaxcala and Michoacan in the central part and Coahuila and Nuevo Leon in the northern section of the country.

Production of Cotton Mills Reported by Semesters.

During the six months ended October 31, 1928, Mexico had 137 cotton mills active and 16 idle, according to the Bureau of Special Taxes. Approximately $37,000,000 is invested in the cotton industry, which employed about 39,000 operatives in 1928. The aggregate number of mill hours worked during the year ended October 31, 1928, was 440,784, and cotton consumption totalled 173,525 bales of about 500 lbs. each, as against 497,802 mill hours and 181,525 bales of cotton consumed during the previous 12 months. The output of the mills declined from 81,336,000 lbs. for the year ended October 31, 1927, to 77,473,000 in the succeeding 12 months, but the value of sales increased from $42,984,000 to $46,362,000. The 1928 production comprised 8,459,000 lbs. of cotton yarn, 66,493,000 of cloth, 1,510,000 of knit goods, and 1,011,000 of other cotton manufactures. Further comparison by six-month periods are made in the following table:—

ACTIVITY AND PRODUCTION OF MEXICAN COTTON MILLS BY SIX-MONTH PERIODS.

	Six months ended—			
	1927		1928	
Item	April 30	Oct. 31	April 30	Oct. 31
Mills operating (number) ...	143	144	144	137
Mills idle (number) ...	17	15	17	16
Active spindles (number) ...	832,193	821,211	840,761	836,391
Active looms (number) ...	30,790	30,437	30,438	30,130
Knitting machines, active (number)	1,811	1,809	1,658	1,547
Printing machines, active (number)	51	50	52	47
Capital invested (dollars)...	36,335,000	36,401,000	37,088,000	*
Operatives employed (number)	41,214	41,238	39,255	39,041
Mill hours worked (number)	242,544	255,258	223,177	217,607
Cotton consumed (bales) ...	84,229	97,296	87,020	86,505
Production:				
Cotton yarn for sale, lbs.	3,570,000	3,833,000	4,171,000	4,288,000
Cotton cloth, lbs. ...	32,861,000	38,441,000	33,797,000	32,696,000
Cotton knit goods, lbs. ...	570,000	741,000	737,000	773,000
Other cotton manufactures lbs.	615,000	705,000	432,000	579,000
Total production, lbs.	37,616,000	43,720,000	39,137,000	38,336,000
Value of sales (dollars) ...	21,193,000	21,791,000	23,427,000	22,935,000

* Not received.

Types of Goods Produced by Mexican Cotton Mills.

Details of the production of Mexican cotton mills were not received for the year ended October 31, 1928, but in the preceding 12 months unbleached cotton cloth comprised approximately one-third of the output of cotton piece goods. Yarn-dyed goods and prints each accounted for about 20 per cent. of the total, bleached goods for a little more than 10 per cent., and piece-dyed goods for slightly less than 10 per cent. Cotton drill and duck were woven in small quantities by the mills. Unbleached sheeting, locally known as "manta," constitutes the entire output of a number of mills and the principal product of others. The minor items in the production of the Mexican cotton mills for the year ended October 31, 1927, were towels, blankets and quilts, hosiery, underwear, sweaters and thread.

TEXTILE WAGES IN ENGLAND.

The Ministry of Labour Gazette published in October the results of a census of wages in manufacturing industries in October, 1928, as compared with a similar inquiry in 1924. The returns for cotton are exceptionally full, relating to 376,390 work-people in 1928, as compared with a similar inquiry in 1924. They give average weekly earnings for all workers covered by the inquiry as 37s. 7d. in October, 1924, and 37s. 8d. in October, 1928, an increase of .2 per cent. The average earnings for males and females are:—

	Males		Females	
	s.	d.	s.	d.
October, 1924	47	7	29	2
October, 1928	48	2	29	1

The difference in male earnings is largely explained by the fact that in October, 1928, less short time was worked than in October, 1924. In the 1928 week 13.4 per cent. of the work-people were on short time, the average number of hours lost by those on short time being 12.7. This gives an average spread over the whole of the work-people of 1.7 hours lost per week. In the 1924 week 17.2 per cent. worked short time, and lost 14 hours a week. This gave an average over the industry of 2.4 hours lost per day.

In the bleaching, printing, dyeing, and finishing trades earnings were less in 1928 week than in 1924, more short time being worked than in the earlier period. Last October no fewer than 45.2 per cent. of the operatives were on short time, losing 11.3 hours a week on the average, which spread over the industry was a loss of 5.1 hours per operative. In 1924 the average was four hours a week.

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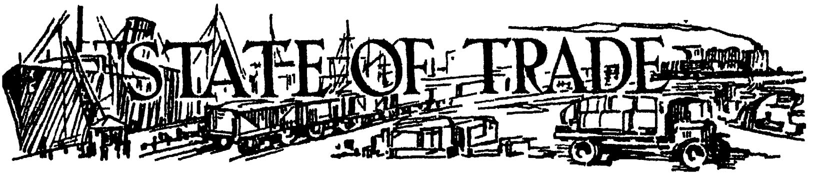


REPORTS FROM ASSOCIATIONS.

AUSTRIA.

SPINNING SECTION.

Market conditions during the third quarter of the year 1929 turned out more unfavourable, both as regards the quantity of sales and the price. Spinners' losses have not disappeared and the exportation of excess production was only possible in insufficient quantities, even at a sacrifice of prices.

Under these conditions organized short time had to be increased; this reduction in production had to be brought about without causing any perceptible strain on the home market. Besides short time, many old spindles were scrapped; the total number of spindles existing in Austria shows to-day a reduction of about eight per cent. within the space of a year. A large number of the dismantled spindles have been exported to other countries. By means of these measures the accumulation of stocks, which would otherwise have been inevitable, was retarded.

The exports statistics, which are available for the first half of the current year, show total imports of 5,634 metric hundredweights of cotton yarns, as against 5,552 in the same period of the previous year, and have therefore risen, although only slightly, notwithstanding the recent retrogression in the home consumption of yarns. On the other hand exports of yarns for the same period have decreased significantly, i.e., 25,350 metric hundredweights, as against 29,195 in the first half of 1928, which is about 13 per cent. decrease. The greatest reduction in yarn exports is to Germany, but business with Hungary and Rumania is also on the decline.

The prospects for the yarn trade in the near future are very uncertain; they are considered as unfavourable because there are no indications of a probable improvement of demand by the weaving section, neither in the countries to which we export, nor by the home industries which consume our yarn, as they are also suffering from the crisis.

WEAVING SECTION.

Apart from a few specialities the situation in the weaving section has been unsatisfactory during the last few months, and at the moment sales are considerably smaller than they were at this time last year. Consequently the margin of profit is unsatisfactory, not only in grey goods, which are considered staple goods, but also in coloured goods, which in the last few years have commanded a relatively higher margin of profit.

This reduction in prices must be attributed partly to the offers made from abroad and also, to some extent, owing to the falling-off in home consumption, due to the poorer economic conditions of the country.

The imports of cloth in the first half of 1929 and the same period of 1928 are given in the original report below.

It should be noted that in the export figures, among the bleached, dyed and printed cloths are included foreign goods sent to this country for finishing only. The Austrian mills have had only a small share in their manufacture.

With regard to the future outlook of conditions in the weaving industry this is practically the same as for the spinning section. There exists no reason why a decisive change for the better should be expected—unless it comes through government aid, by stopping imports of cloth which are out of relation to the purchasing power of the country.

(The following is the original in German.)

BAUMWOLLSPINNEREI.

Die Absatzverhältnisse haben sich im dritten Quartal des Jahres 1929 gegenüber dem ersten Semester ungünstiger gestaltet, u.zw. sowohl in Bezug auf die verkauften Mengen, als auch hinsichtlich der Preisbildung. Die Verlustmarge der Spinnerei ist nicht verschwunden und der Export des Produktionsüberschusses war nur in unzulänglichem Ausmasse sowie unter Preisopfern möglich. Unter diesen Verhältnissen mussten die Reduktionsmassnahmen erweitert werden, ohne dass hierdurch eine fühlbare Entspannung am inneren Markte eingetreten wäre. Neben den Betriebseinschränkungen wurden auch endgiltige Stillegungen durchgeführt, so dass die Gesamtzahl der in Oesterreich vorhandenen Baumwollspindeln seit Jahresfrist eine Herabminderung um cca. 8% des früheren Standes erfahren hat. Ein Grossteil der stillgelegten Spindeln wurde ins Ausland transportiert. Mit Hilfe der erwähnten Einschränkungsmassnahmen wurde ein Anwachsen des Garnlagers, das sonst unvermeidlich gewesen wäre, hintaengehalten.

Die Aussenhandelstatistik, welche für das erste Semester des laufenden Jahres vorliegt, weist eine Gesamteinfuhr in Baumwollgarnen von 5,634 Meterzentnern gegenüber 5,552 Meterentnern im vorausgegangenen Jahre auf und ist daher ungeachet des Rückganges im inländischen Garnverbrauch neuerdings, wenn auch in einem geringen Ausmasse, gestiegen. Demgegenüber ist die Garnausfuhr in der gleichen Zeit nicht unerheblich zurückgegangen u.zw. auf 25,350 Meterzentner von 29,195 Meterzentner im ersten Semester 1928, das ist um rund 13%. Am empfindlichsten wirkt sich nach wie vor der Ausfall im Garnexport nach Deutschland aus, doch ist auch das Geschäft mit Ungarn und Rumänien rückläufig.

Die Aussichten für die Gestaltung des Garngeschäftes in der nächsten Zukunft sind unsicher, werden aber eher ungünstig beurteilt, weil keine Anzeichen für eine nemenswerte Belebung der

Webereikonjunktur in den für den Garnexport in Betracht kommenden Ländern gegeben sind und weil auch die garnverbrauchenden Industrieen des Inlandes krisenhafte Geschäftsverhältnisse aufweisen.

BAUMWOLLWEBEREI.

Von einigen Spezial-Artikeln abgesehen haben sich die Beschäftigungsverhältnisse der Webereien in den letzten Monaten ungünstig entwickelt und der augenblickliche Verkaufsstand its erheblich geringer, als er zum gleichen Zeitpunkte des vorigen Jahres war. Demzufolge ist auch diem Preislage eine unbefriedigende, u.zw. nicht nur in den als Stapel-Artikel anzusehenden Rohgewebesorten, sondern auch in Buntwaren, welche in den letzten Jahren ein relativ besseres Preisniveau halten konnten. Diese Verschlechterung ist zum Teil auf weitgehende Preisunterbietungen des Auslandes, zum anderen Teil auf einen allgemeinen Konsumrückgang infolge der verschlechterten Wirtschaftslage des Landes zurückzuführen.

Die Gewebe-Einfuhr hat sich im ersten Semester 1929 im Vergleich zum vorausgegangene Jahre wie folgt gestaltet:

IMPORT STATISTIK (IMPORTS).

	1929 Meterzentner	1928 Meterzentner
Rohe Baumwollgewebe (Grey cloths)	14,389	16,331
Gebleichte Baumwollgewebe (Bleached cloths)	2,093	2,383
Gefärbte Baumwollgewebe (Dyed cloths)	2,211	2,116
Bedruckte Baumwollgewebe (Prints)	860	849
Buntgewebte Baumwollgewebe (Fancy-woven cloths)	4,352	4,293
	23,905	25,972

AUSFUHR-STATISTIK (EXPORTS).

	1929 Meterzentner	1928 Meterzentner
Rohe Baumwollgewebe (Grey cloths)	389	349
Gebleichte Baumwollgewebe (Bleached cloths)	2,944	2,591
Gefärbte Baumwollgewebe (Dyed cloths)	902	1,020
Bedruckte Baumwollgewebe (Prints)	2,671	2,979
Buntgewebte Baumwollgewebe (Fancy-woven cloths)	1,161	981
	8,067	7,920

Zu vorstehenden Ausfuhr-Ziffern ist noch zu bemerken, dass sie sich bei den gebleichten, gefärbten und bedruckten Geweben überwiegend auf den sogenannten "Veredlungsverkehr" beziehen, demnach auf ausländische Rohware, welche im Inlande nur ausgerüstet und dann exportiert wird. An diesem Export sind daher die österreichischen Webereien nur in einem ganz geringen Ausmasse beteiligt.

Hinsichtlich der geschäftlichen Aussichten gilt für die Weberei ungefähr das gleiche, was im Vorstehenden bezüglich der Spinnerei ausgeführt wurde. Es besteht kein Anlass, eine entscheidende Konjunkturänderung zu erwarten, soferne es nicht mit staatlicher Unterstützung gelingen sollte, die in einem Missverhältnisse zur Aufnahmsfähigkeit des Landes stehende Gewebeeinfuhr einzudämmen.

(*Verein der Baumwollspinner und Weber Oesterreichs.*)

BELGIUM.

The situation in the cotton industry has scarcely improved since our last reports. Exports of cotton yarns are not yet satisfactory During the first eight months of 1929 only 3,704 tons of unbleached yarns were exported, as against 5,172 tons in the same period of 1928. Owing to the fact that our industry has to export the major portion of its production in the form of yarn or in the form of cloth, our spinners and manufacturers have been obliged to accept very poor prices in order to avoid short-time working.

The rise in the cost of living has brought about another increase of 5 per cent. in the wages list This increase has taken effect on the 16th October.

The original report in French follows:—

La situation de l'industrie cotonnière ne s'est guère améliorée depuis nos derniers rapports Les exportations en filés de coton ne sont pas satisfaisantes. Il n'a été exporté durant les 8 premiers mois de 1929 que 3704 tonnes de filés de coton écrus contre 5,172 tonnes durant la même période de 1928. Comme notre industrie doit vendre à l'étranger la majeure partie de sa production soit sous forme de tissus, nos industriels tant filateurs que tisseurs doivent accepter de fort mauvais prix pour ne pas être obligés de chômer.

La hausse du coût de la vie a entrainé une nouvelle majoration de 5 pour cent. sur les salaires de base. Cette majoration est appliquée à partir du 16 octobre.

(*Société Coopérative Association Cotonnière de Belgique, Ghent.*)

BRAZIL.

According to the U.S. Department of Commerce, the Brazilian textile market continues to be depressed, owing to the heavy stocks of goods on hand. Domestic mills have been forced further to curtail production on account of the slow demand and restricted credit. The demand for silk yarns is good, and, for cotton yarns, fair.

CZECHO-SLOVAKIA.

SPINNING SECTION.

The activity of the fine-spinning section, which during the summer months had sunk to about 80 per cent. of full production, increased again to 88 per cent., due to the usual seasonal activity, although it should not be assumed that the situation of the Czecho-Slovakian spinning industry has improved, for most of the mills continue to work more or less short time for want of further orders.

The quantity of yarns sold during the last quarter did not reach the same amount sold in the previous quarter, and was also considerably less than for the same period of the previous year. We only just manage to sell the reduced production, and for this reason the stocks of yarn are still very extensive.

Cotton yarn prices have reached such a low level that, on the whole, it is almost impossible to cover the cost of production.

The original statement in German follows :—

Die Beschaftigung der Feinspinnereien, die in den Sommermonaten auf durchschnittlich 80% der normalen Leistungsfahigkeit gesunken war, ist unter dem Einfluss der saisonmassigen Belebung wieder auf etwa 88% gestiegen, doch kann daraus keinesfalls auf eine Besserung der Lage der csl Spinnindustrie geschlossen werden, weil die meisten Fabriken mangels grosserer Auftrage fortgesetzt mit mehr oder weniger bedeutenden Betriebseinschrankungen arbeiten mussen.

Die im abgelaufenen Quartal verkaufte Garnmenge erreichte nicht die Hohe des vorhergehenden Vierteljahres und blieb auch erheblich hinter der Verkaufsmenge im gleichen Zeitraum des Vorjahres zuruck Es konnte gerade nur die reduzierte Produktion abgesetzt werden, weshalb die Garnlagerbestande noch immer sehr umfangreich sind.

Die Baumwollgarnpreise haben einen derart niedrigen Stand erreicht, dass sie im allgemeinen kaum noch die Gestehungskosten decken.

ENGLAND.

SPINNING SECTION.

The state of trade in the spinning section has hardly changed since the issue of our last report. The curtailment of production in the American Section is approximately 20 per cent., and that of the Egyptian Section 5 per cent. After a three-weeks' stoppage the wage reduction of about 6¼ per cent. on the current rates came into force on the 14th September.

The cotton-spinning industry is gaining some relief from the Government's reduction of local taxation This relief is calculated to amount to 0·1d. per pound of 42's pin cop weft.

WEAVING SECTION.

The manufacturing section of the industry has experienced some difficulties during the last three months. The three weeks' stoppage on account of the wages dispute had an adverse effect upon our order books. Statistics received show that there are slightly less looms running at the end of September than there were before the stoppage took place. The end of the depression does not yet appear to be in sight. Manufacturers are taking more interest than formerly in new methods, and it is hoped that the alterations in manufacturing conditions which are going forward will bring our industry to a better competitive position.

(*Cotton Spinners and Manufacturers' Association.*)

FRANCE.

The conditions existing when we made the report for the No. 28 issue of the INTERNATIONAL COTTON BULLETIN have not undergone any important change during the last quarter under review. Nevertheless, in the American spinning section in some districts there is a very slight tendency towards improvement. In the spinning of Egyptian cotton the situation is rather worse in consequence of a small increase in the stocks. As regards woven goods, the situation may be described as being slightly better than in the spinning section. The engagements continue on the basis indicated in our last report and may be described as representing three months' work.

In all the cotton districts of France shortage of labour is being felt more severely than before, and the consequence is that about 15 per cent. of the looms and 10 per cent. of the spindles are stopped. Increases of wages of varying importance have had to be paid in the Vosges, Alsace and Lille.

Prices do not leave any profit to the industralists. They are particularly unfavourable in the spinning section.

The imports and exports of cotton yarns and cloth will be seen at the end of the following original French reoort:

La situation décrite dans le No. 28 du Bulletin International Cotonnier n'a pas subi de modification importante au cours du dernier trimestre. Toutefois dans la filature Amérique de certaines régions on remarquerait peut-être une très légère tendance à l'amélioration. Dans la filature de coton égyptien situation encore plutôt alourdie par suite d'une petite augmentation des stocks. En ce qui concerne le tissage, situation un peu moins mauvaise qu'en filature. Les engagements à livrer se maintiennent sur la base précédemment indiquée et représentent, dans l'ensemble, environ trois mois de fabrication.

On constate dans toutes les régions cotonnières une pénurie de main-d'œuvre de plus en plus aigüe et l'outillage arrêté de ce fait peut être estimé à 15 pour cent. pour les métiers et 10 pour cent. pour les broches. Des augmentations de salaires d'importance variable sont intervenues dans les Vosges, en Alsace et à Lille.

En ce qui concerne les prix, ils continuent à ne laisser aucuns marge l'industriel, notamment pour la filature.

COMMERCE EXTERIOR.

I. IMPORTATIONS (IMPORTS):

	1er semestre, 1929 (1st Quarter, 1929) Quintaux Métriques (Metric Quintals)
Fils de coton (Cotton yarns)	16,630
Tissus de coton (Cotton cloth)	11,045

II.—EXPORTATIONS (EXPORTS):

Fils de coton: Exportations totales (Cotton yarns: Total exports)	85,862
PRINCIPAUX PAYS DE DESTINATION (Principal Countries of Destination):—	
Algérie, Colonies françaises et pays de protectorat (Algeria, French Colonies and Protectorate Countries)	6,684
Allemagne (Germany)	21,610
Union Economique Belgo-Luxembourgeoise (Economic Union of Belgium—Luxembourg)	19,968
Pays-Bas (Holland)	7,829
Suisse (Switzerland)	9,342
Pologne (Poland)	3,007
République Argentine (Argentine)	2,346
Tissus de coton: Exporatations totales (Cotton cloth: Total exports)	329,283

PRINCIPAUX PAYS DE DESTINATION (Principal Countries of Destination) :—

Algérie, Colonies françaises et pays de protectorat (Algeria, French Colonies and Protectorate Countries)	193,161
Allemagne (Germany)	12,255
Angleterre (England)	16,922
Suisse (Switzerland)	17,057
Union Economique Belgo-Luxembourgeoise (Economic Union of Belgium—Luxembourg)	18,642
République Argentine (Argentine)	11,399
Etats-Unis (United States)	8,730
Pays-Bas (Holland)	3,834
Grèce (Greece)	2,392

(*Syndicat Général de l'Industrie Cotonnière Française.*)

GERMANY.

SPINNING SECTION.

The position of the German cotton spinning industry during the third quarter of 1929 was very similar in most respects to the previous two quarters of 1929. There was no chance of improving selling prices or remedying the marketing difficulties. A slightly better inquiry during August for cotton yarns was quickly dispelled shortly after its commencement. Imports of foreign yarns increased during the months of July and August, as compared with June; in fact during August, yarn imports were larger than in any month of the previous quarter.

Hours worked on the average during the third quarter were about two thirds of the normal working time.

Towards the end of the quarter demand was somewhat better; although selling prices were still below cost.

The original in German follows:—

SPINNEREI.

Die Lage de deutschen Baumwollspinnerei ist im 3. Quartal 1929 im grossen und ganzen die gleiche geblieben wie in den vorhergehenden Abschnitten des Jahres 1929. Die Absatzschwierigkeiten und die Unzulanglichkeit der Verkaufspreise konnten nicht behoben werden. Eine geringe Aufbesserung im Monat August in der Nachfrage nach Baumwollgarnen verlief unmittelbar nach ihrem Auftreten sofort wieder. Die einfuhr ausländischer Garne hat in den Monaten Juli und August gegenüber dem Vormonat Juni wieder zugenommen, im August ist sie sogar höher gewesen als in irgendeinem Monat des voraufgegangenen Vierteljahres.

Der Beschäftigungsgrad hat in Durchschnitt des 3. Vierteljahres nur etwa 2/3 der Leistungsmöglichkeit bei normaler Arbeitszeit betragen.

Gegen Schluss des Quartals hat sich die Nachfrage etwas gebessert; indessen sind die Absatzpreise immer noch verlustbringend.

(*Abeitsausschuss der Deutschen Baumwollspinnerverbände, Berlin.*)

WEAVING SECTION.

The average condition of the South German cotton manufacturing industry did not show any improvement during the third quarter of the year. The working of short time, which was necessary during the first half of the year, has, in fact, been increased, so that at present only 70 per cent. of full production is being worked. The amount of orders on hand at the end of the quarter was smaller than at the same time in previous years.

Prices obtained are extremely unsatisfactory.

Short time will also have to be worked during the forthcoming months.

The original German report reads as follows:—

Die allgemeine Lage der süddeutschen Baumwollweberei hat im 3. Vierteljahr keine Besserung erfahren. Die Betriebseinschränkungen, die bereits im 1. und 2. Vierteljahr 1929 durchgeführt werden mussten, haben teilweise sogar eine weitere Zunahme erfahren, sodass im allgemeinen nur mit ca. 70% der Vollproduktion gearbeitet werden konnte. Der am Schlusse des Vierteljahres vorhandene Auftragsbestand bleibt hinter dem um die gleiche Zeit zu verzeichnenden Auftragsbestand in früheren Jahren wesentlich zurück.

Vollkommen unbefriedigend sind nach wie vor die erzielten Preise.

Betriebseinschränkungen werden auch in den folgenden Monaten durchgeführt werden müssen.

(*Verein Süddeutscher Baumwollindustrieller, Augsburg.*)

HOLLAND.

SPINNING.

Although the demand for yarns has somewhat improved, prices are still very poor and spinners complain of insufficient margins. Especially in the coarser counts of ring twist, competition is very severe and spinners find it difficult to sell their production.

WEAVING.

On account of the favourable weather the demand for home-trade consumption is better than a few months ago. Manufacturers for this trade are fairly busy, although in some cases complaints about the prices obtainable are heard.

As regards the export trade, the demand is far from good and stocks for the overseas markets of the mills are larger than usual. Foreign competition is also very keen and in many cases orders can be obtained only by sacrifices in price.

HUNGARY.

The situation of the Hungarian cotton industry has altered this year in one way, namely, that the home market has been supplied in larger quantities by the home industry; the home demand was normal, but imports of cotton goods decreased. The organized short time imposed on the industry last year could, on the whole, be abandoned. In spite of the tolerably favourable business conditions, low prices and poor selling conditions are general. The profits of the mills leave much to be desired. The export of cotton yarns has increased slightly, but against this our exports of cloths are less than in the previous year.

The original communication in German follows:—

Die Lage der ungarischen Baumwollindustrie hat sich in diesem Jahre in der Richtung verändert, dass bei gleichbleibendem Inlandsverbrauch und zurückgehendem Import in Baumwollgeweben der Inlandbedarf in einem erhöhtem Masse durch die einheimschen Fabriken befriedigt wurde. Die Betriebsreduktionen des Vorjahres konnten somit im allgemeinen wieder behoben werden. Trotz der ziemlich günstigen allgemeinen Wirtschaftslage sind gedrückte Preise und verschlechterte Verkaufskonditionen zu verzeichnen. Die Rentabilität der Betriebe lässt somit manches zu wünschen übrig. Der Export von Baumwollgarnen hat sich etwas erhöht, dagegen ist die Ausfuhr von Geweben geringer als im Vorjahre.

ITALY.

The situation of the Italian cotton industry may be described as being without change since our last report.

The abundance of the agricultural crops of Italy leads one to hope that the home market will improve. On the other hand, in consequence of the increasing difficulties abroad, the situation is not favourable.

The Italian cotton spinning industry has still sufficiently regular work. The stocks per spindle and the engagements may be considered normal, but sales are taking place with a very limited margin of profit or even none at all.

The activity of the weaving section has in some lines been increased during the last few months, but the manufacturers of fancy goods complain very much; the small demand is evidently due to the fact that fashion has turned to printed goods.

The exports of Italian manufactured cotton goods by quantities, but not from the point of view of profit, may be considered to be satisfactory. During the first seven months of 1929 there were exported 142,000 quintals of cotton yarn against 139,900 in 1928 and 114,000 in 1927. In the same period from the 1st January to 31st July, 1929, there were exported woven goods and other allied goods amounting to 348,600 quintals, against 306,000 during the first seven months of 1928 and 270,900 during the first seven months of 1927.

JAPAN.

The Bureau of Foreign and Domestic Commerce of U.S.A. states that Japanese production of cotton yarn declined from 1,187,083 bales of 400 lbs. each in the first six months of 1928 to 747,759 in the first half of 1929, according to the monthly reports of the Japanese Cotton Spinners' Association. Weaving departments of the Association's mills consumed 418,618 bales in the 1929 half-year, compared with 362,817 bales in the corresponding period of 1928. Exports of yarns declined from 39,213 bales in the 1928 six-month period to 33,837 in the 1929 half-year. Production of cotton cloth in the weaving departments of the Association's mills (representing approximately half of the power looms for goods wider than 15 inches in the entire Japanese cotton manufacturing industry) amounted to 762,875,000 yards in the first six months of 1929, a considerable increase over the 668,146,000 yards produced in the corresponding period of 1928. Exports of cotton cloth rose from 711,207,000 square yards in the 1928 half-year to 872,131,000 in the 1929 six-month period. Exports of cloth during July, 1929, totalled 154,905,000 square yards, as against 115,218,000 in July, 1928. Stocks of cotton cloth in public warehouses (not including stocks held at the mills) at Kobe and Osaka declined from 93,288 bales (size not stated) on June 30, 1929, to 85,164 at the end of July. Stocks on July 31 last year stood at the high figure of 124,365 bales, the peak of 1928, which, however, was smaller than stocks on July 31, 1927, amounting to 130,139 bales. The foregoing data on cotton cloth are summarized in the following table:—

JAPANESE PRODUCTION, EXPORTS AND STOCKS OF COTTON GOODS DURING FIRST SIX MONTHS OF 1928 AND 1929.

Month	Cloth produced		Cloth exported		Stocks in Kobe and Osaka at end of month	
	1928 1,000 yds.	1929 1,000 yds.	1928 1,000 sq. yds	1929 1,000 sq. yds.	1928 Bales	1929 Bales
January	103,807	122,410	114,857	140,371	106,626	90,791
February	110,141	121,866	136,761	120,569	89,976	90,961
March	111,687	125,511	141,588	149,299	84,430	92,896
April	114,682	130,577	109,926	161,542	94,419	87,117
May	114,718	132,041	113,825	161,338	103,416	93,888
June	113,111	130,470	94,250	139,012	116,806	93,288
Total	668,146	762,875	711,207	872,131	—	—
July	116,351	—	115,218	154,905	124,365	85,164

Source: Production from reports of the Japanese Cotton Spinners' Association; exports and stocks from reports of the Japanese Cotton Merchants' Union and the Cotton Yarn and Cloth Exporters' Union.

Official Japanese export figures of cotton cloth differ only slightly from those reported by the Japanese Cotton Merchants' Union and the Cotton Yarn and Cloth Exporters' Union. Exports to the five leading markets during July were as follows:—

	Square yards	Value in Yen.
Total to all countries	154,901,000	36,958,591
British India	54,139,000	10,321,053
China	46,458,000	14,424,589
Netherland East Indies	16,219,000	3,548,813
Hong Kong	7,976,000	1,976,632
Egypt	5,094,000	1,161,750

SPAIN.

The situation continues without much change, but the prospects are somewhat brighter, as the orange, wheat and olive crops appear to be very good. This causes more confidence in the future. There seems to be in Barcelona slightly more business, although it is not on the scale corresponding generally to this period of the year, and the small demand which we are experiencing is somewhat upsetting for the industrialists, particularly as the sales made are far from remunerative; it is to be hoped that business will soon return to its normal basis.

The fluctuations which have recently taken place in the foreign exchange have counteracted the fall that has taken place in the price of raw cotton.

SWITZERLAND.

The continued unsteady outlook in the cotton and cotton goods market had its depressing effect on the extent of occupation and the prices obtained in Switzerland for semi-manufactured and fully manufactured cotton goods. The adverse situation created by the insufficient sales of national goods in the home market was accentuated by pressing offers from abroad at prices incredibly low, and consequently the state of trade has become during the last few months considerably worse. Orders are small, and for delivery within too short a period; two sure indications of lack of confidence in the market situation. These conditions are forcing such a reduction in prices that manufacturers have to suffer frequently severe losses.

Some of our coarse and medium-fine spinning mills are reducing their output up to 35 per cent., and yet, in spite of this, some are still making goods for stock. The fine spinning section complains of the negligible demand for quality yarns and mule yarns. Ring yarn demand has improved slightly during the last few weeks, but there is still no margin of profit. In the doubling section there was overproduction and underselling on the part of a number of small concerns, and this phase seems likely to extend. In the weaving of grey goods curtailment of production has increased; in the coarse section as much as 50 per cent. are idle in some cases, and in the weaving of fine goods up to 40 per cent. Nevertheless, this does not seem to be the likely limit, as every week witnesses further curtailments. Makers of coloured goods are not as badly off, but are suffering in sympathy; so far, most of these mills are fully engaged, but there are 13 per cent. of this section on short time. For the immediate future there is no indication of an improvement; in some sections there exists a uniform pessimistic outlook.

Exports and imports for the third quarter of 1929 are stated at the end of the following original German report:—

SITUATIONSBERICHT III. QUARTAL 1929, SCHWEIZ.

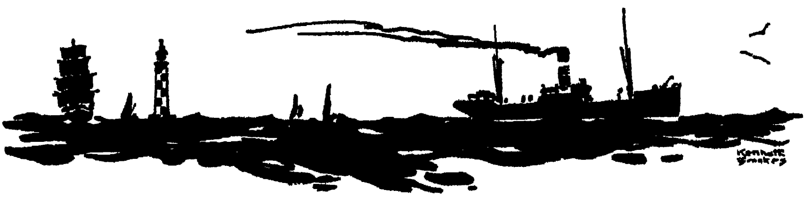
Entsprechend der andauernd unsichern Marktlage für Baumwolle und Baumwollwaren, liessen die Beschäftigung und die erzielten Preise für Halb- und Fertigfabrikate sehr zu wünschen übrig. Einem ungenügenden Absatz der einheimischen Etablissemente gesellte sich drängendes Angebot von Importware zu unglaublich niedrigen Preisen bei, sodass das Geschäft in den letzten Monaten eine erhebliche Verschlechtung erfuhr. Zu kurze bemessene Lieferfristen und kleine Aufträge sind untrügliche Zeichen mangelnden Vertrauens des Handels in die Marktentwicklung. Aus diesen Zuständen resultiert ein Preisdruck, der den Fabrikanten zum Teil bedenklichem Umfange zu Schaden kommen lässt.

Grob- und Mittelfeinspinnerei nahmen Produktionseinschränkungen bis zu 35 Prozent im Einzelfall vor, was indessen nicht zu hindern vermochte, dass noch teilweise auf Lager gearbeitet werden musste. Die Feinspinnerei klagt über Vernachlässigung der Qualitätsgarne und Selfaktorgespinste, wodurch Zehntausende von Selfaktorspindeln stillgelegt wurden. Wohl machte sich in den

letzten Wochen eine Belebung der Nachfrage nach Drosselgarnen bemerkbar, aber die offerierten Preise erreichten selten eine Höhe, die den Spinner vor Verlusten bewahrt hätte. In der Zwirnerei schufen Ueberproduktion und Preisunterbietung durch zahlreiche Kleinbetriebe eine unerquickliche Situation, die sich noch weiter zu verschärfen droht. Auch in der Rohweberei mehrten sich die Produktionseinschränkungen ständig, in der Grobweberei stiegen sie bis zu 50, in der Feinweberei bis zu 40 Prozent im Einzelfall an. Damit scheint aber die Tiefpunkt der Depression noch keineswegs erreicht zu sein, indem von Woche zu Woche neue Kürzungen Platz greifen. Die allgemeine Ungunst färbt zusehends auch auf die Buntweberei ab; wenn sie auch einstweilen noch mehrheitlich voll beschäftigt ist, so weist doch das Vorhandensein von 13 Prozent Kurzarbeitern inmitten der Wintersaison auf ein Abflauen der Nachfrage hin. Für die nächste Zukunft fehlen einstweilen Anzeichen einer Besserung, in vereinzelten Branchenzweigen begegnet man sogar einer einhellig pessimistischen Einstellung

III. QUARTAL 1929.

	IMPORT.		EXPORT	
	Menge q. kg.	Wert Fr.	Menge q. kg.	Wert Fr
Cotton yarns (Baumwollgarne)	9,415·88	8,042,426	17,862·19	12,695,375
Cotton cloths (Baumwollgewebe)	6,293·97	6,881,705	10,278·91	18,641,784
Cotton embroidery (Stickereien)..	24·42	156,682	6,675·00	21,138,557
	15,734·27	15,080,813	34,816·10	52,475,716



MISCELLANEOUS

Cotton Goods Propaganda.

Paper prepared for the Fourteenth International Cotton Congress in Barcelona, by Dr. WALTER BÖHM, Manager of the South German Cotton Spinners and Manufacturers' Association, Augsburg.

THE increase in the consumption of cotton goods, a subject which is to be discussed at the Congress, is of considerable importance to the German cotton industry. The examination of the various questions relating to this matter which had already been going on for some years received a strong impetus through the important communications which Mr. ARNO S. PEARSE, the General Secretary of the International Cotton Federation, made in his interesting report on his last journey through the United States of America, with regard to the measures undertaken there for the maintenance and increase of the use of cotton goods (*International Cotton Bulletin*, No. 25, pages 53–64), and furthermore by his instructive address before a general meeting of the South German Cotton Spinners and Manufacturers' Association, on November 9, 1928.

The interest in this subject was largely increased throughout Germany owing to the fact that the German cotton industry had, during the latter period, shown a decided tendency of reduced facilities for selling its output, a retrograde movement which could not be explained merely on account of seasonal influences. The German cotton industry may be rightly of the opinion that the immediate cause of its particularly acute present crisis, which appears to become a chronic depression, is due to insufficient import duties, as the present rates of the tariff are not in a real relation to the high cost of production in Germany, but it must also be considered that the economic, social and financial conditions of every country influence the sale of the products of its cotton industry, and that in Germany the pauperization of huge sections of the population in consequence of the War and of inflation, the continued crisis of German agriculture, the too heavy burden of the whole population through taxation and social payments, have been the cause that the people have not had the money to buy textile goods, particularly cotton goods. We ought to recognize that there are also other circumstances of a general kind, which seem to have assumed more or less an international aspect, that have reduced the requirements of the population in cotton goods, and are threatening to reduce them still further; an example is merely given by the radical change of fashions, particularly underclothing, the advance of artificial silk, and finally one of the causes of the retrogression in the use of cotton must be attributed to the ever-increasing desire of the population to spend too much money on all kinds of pleasures, such as excursions, journeys, picture-shows, to excessive cigarette smoking, and the devotion to sports, etc., much more so than the last generation has done.

As it seemed necessary to study the entire problem of maintaining and extending the use of cotton goods in a systematic way, on the initiative of the South-German Cotton Spinners and Manufacturers' Association a special committee has been formed, under the auspices of the Federation of German Cotton Manufacturers in co-operation with the German Federation of Cotton Spinners, together with the Federation of German Finishers, for the purpose of undertaking a cotton goods propaganda. Such propaganda is really, owing to its own nature, not a subject to be dealt with by an individual country, but is one which rightly should be taken up by the cotton industries of the whole world. Of course, the details of execution will have to be adjusted according to the special conditions of each country.

As a member of the above-mentioned committee of the German cotton industry, I take the liberty of submitting to this Congress the general view-points which have been formulated by this committee for its further work.

I.

Propaganda cannot achieve the impossible, it cannot create economic foundations, nor can it remove them. Propaganda cannot conjure up purchasing power, nor can it make a nation richer than it is. What it can do, if undertaken on proper methodical lines, on a large scale and with a view to the more distant future rather than the immediate future, is to awake latent requirements and to stimulate amongst the public suggestive power for the demand of cotton goods.

The fundamental supposition must be that every market is carefully studied as to the selling possibilities and limitations, as to tendencies of the requirements of the masses and of fashion currents. It is further necessary that the article which is to be advertised must be studied carefully as to its qualities and its possible uses, in order to find out the necessary material points for advertising and the aim of such propaganda. Expressed in a practical way, we may say that it will be necessary for a collective cotton propaganda to stress the indisputable advantages of cotton as compared with other fibres, namely: "its durability, its moderate price, its resistance to washing and boiling, its great diversity of use," without embarking, however, on a campaign against wool, linen or artificial silk.

The propaganda must not end in empty phrases or mere statements, but it must be based on justifiable and convincing arguments in favour of sale or purchase.

For the purpose of preparing sound propaganda it will be necessary to endeavour to search for new possibilities of cotton uses, both as regards industrial use, as also personal use, i.e., personal requirements, such as clothing, outer garments and underclothing, table and bed-clothing, decoration material, furniture material, etc. It will be necessary to find out convincing or striking arguments that will create a desire on the part of the consumer to buy cotton goods. The value of cleverly chosen slogans is great for creating propaganda in favour of the sale of goods.

There are undoubtedly further uses in the daily life in which more cotton could be used than heretofore; it will require only to direct the attention of the public to these uses. As an example we have the white overall for nurses and other occupations, or the coloured print overall for kitchen use.*

II.

In order to achieve the execution of the propaganda, the co-operation of the specialized press of industry, commerce, and specialized trades is necessary. Publications for circulation amongst women should assist. The leading representatives of the different organizations should form a small committee for the purpose in view.

III.

It should be regarded as a primary condition, that individual measures, spontaneously decided upon, are absolutely useless and must merely mean that the money used for it is thrown away. It should rather be recognized that it is necessary to act according to a concrete plan, carefully considered and properly prepared in every detail. For this purpose there is an endless number of advertising institutions at our disposal. Which of these have to be selected will have to be very carefully considered. All individual measures should be co-ordinated in such a way that the combination of these should be of mutual benefit and represent an increasing value in advertising.

In principle, two different kinds of propaganda are to be distinguished. On the one hand, the trade and the making-up section as distributors of goods, and on the other hand the consumer. Different advertising mediums should be applied to both these groups and the following example may serve as a guide, but it should be stated that it is not regarded as a completely worked-out programme, but it is to serve only for the purpose of an informative outline.

1. *Propaganda for the Trade and Making-up.*
    - Collective advertisements in trade papers, assisted by means of editorial propaganda.
    - Placards, postcards, leaflets for retail businesses, coloured insets in the daily press, etc.
    - Material for window dressing.
    - Special exhibits at fairs, etc.
    - Window-dressing prize schemes, and permanent window exhibits.
2. *Propaganda for the public.*
    - Films showing the course of manufacture, amusing films and fashion films for picture shows to be shown in stores, schools and clubs.
    - Lectures by means of films for the instruction of employees in the trade, and in women's clubs.
    - Public placards.
    - Advertisements in women's newspapers or periodicals, agricultural newspapers, co-operative papers, perhaps also in the daily press.
    - Illustrated insets for the daily press.
    - Dissemination of articles by means of correspondence and editorials.

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* For industrial uses see some examples in the "International Cotton Bulletin," No. 28, pages 595-604.

Explanatory leaflets for the public.

Reports on fashion in feminine papers.

Paper patterns, fashion shows.

Collection of utterances of well-known personalities in favour of cotton goods, and dissemination of same by means of leaflets, placards, etc.

Public placards in railway stations, trams and in trains.

Advertisement by wireless.

IV.

Execution of the Propaganda.

It must be realized from the outset that such propaganda does not only cost a great deal of money, but also time, before it can produce results. It is impossible to expect within a few months, or even within one year, a decided effect as a result of such propaganda. Many years will be required.

V.

Finance.

The finding of the necessary funds for such comprehensive propaganda must be taken in hand by the cotton industry itself; all its branches—spinning, weaving, finishing—have a direct interest in this subject; all these should be drawn in to finance the scheme. Of course, all the various sections interested in the raw material should also be contributors.

It should be realized from the outset that the supply of the funds by the cotton industry requires very considerable amounts, and that a propaganda undertaken with insufficient means would be absolutely a waste and have no effect whatever.

I believe that these general view-points, according to which the German cotton industry desires to direct its propaganda for cotton goods, will coincide with the general opinion held on this matter in other countries; of course, it being understood that the details of action will have to vary in the different countries. Whether the efforts will be crowned with the desired success, and cause a permanent improvement in the occupation of the cotton industry, cannot be prophesied, because one never knows in advance the results of any advertising campaign.

The cotton industry should, however, not be subject to the reproach that it has not recognized the changes of time, and that it has not undertaken any steps in this new direction for the purpose of obtaining an increased field of consumption of its products.

In order to obtain a constructive result from these discussions I venture to suggest the following resolution:—

> "*This Congress recommends to every country affiliated with the International Cotton Federation to establish a cotton propaganda committee, in order to examine ways and means which might lead to the extension of the use of cotton goods, and this Congress requests the International Committee to enter into close contact with these various national committees, in order to co-ordinate their various activities.*"

Extending the Use of Cotton Textiles.

A review of the organization and activities of the New Uses Section of The Cotton Textile Institute, Inc.

Specially prepared for the XIV International Cotton Congress at Barcelona, September, 1929, by WALKER D. HINES, President of the Cotton Textile Institute, New York.

AMERICAN cotton manufacturers organized the Cotton Textile Institute, Inc., during the fall of 1926. The Institute created its New Uses Section to develop special activities in studying present and potential markets for cotton textiles and a general programme of market research as to utilization of cotton products.

PURPOSE

The primary function of the Institute's New Uses Section is to study and point out ways of increasing the consumption of cotton fabrics by promoting new or novel uses and extending established uses. This programme has been carefully co-ordinated with special research studies conducted by the Government's Departments of Agriculture and Commerce.

NEW USES COMMITTEE

Soon after the New Uses Section of the Institute was organized it joined with representatives of these two Government Departments in forming a New Uses Committee to consider (*a*) the development of new uses for cotton and cotton products under recent Government appropriations and under the general programme of the Cotton Textile Institute, Inc., and (b) to allocate the different phases of the proposed work. This Committee co-operates with other branches of the Government in co-ordinating their efforts for development of new uses and the extension of present uses for cotton for Government and commercial purposes.

The New Uses Section studies market possibilities for new and extended uses of cotton, co-operates with Governmental agencies in specifications for and simplification and standardization of cotton textiles, and with related branches of the cotton textile industry, such as organizations of cotton growers and cotton merchants, cotton goods selling agents, finishers, converters, cutters-up, wholesalers and retailers in promoting these uses. Information thus obtained is published in newspapers, magazines, special feature articles and booklets. Attention of the mills is called frequently to the fact that while the Section points out many means of increasing the consumption of cotton fabrics, the real results, as represented by additional volume of business, can be achieved only when the mills themselves or their representatives utilize the facts gathered by the Section in a manner suited to their individual promotional efforts.

SCOPE

In pursuing its varied studies of utilization, the Section has been organized to deal with three general types of uses: industrial, comprising staple fabrics not affected by style fluctuations; household uses; and styled fabrics. These three types of uses will be considered in the outline of the Section's work that follows:—

II.

COTTON IN AVIATION

Following closely the automobile industry as a very large consumer of cotton fabrics, the Section is studying the present and potential requirements of the aviation industry for cotton textiles. The Section's studies show that cotton is used for covering the fuselage and wings of many planes, in covering blimps, pilot balloons, dirigibles, flashlight bombs for night aerial photography, and in parachutes, star shells, upholstery, flying suits, and a variety of accessories. It is estimated that more than 2,000,000 square yards of cotton fabrics will be used by the American airplane industry in 1929.

As a result of conferences with representatives of the industry and the Government specifications for fabrics have been simplified and a more suitable and economical fabric developed.

The Institute called to the attention of the Daniel Guggenheim Fund for the Promotion of Aeronautics the possibility of using adhesive letters of cotton fabrics in putting the names of towns on tops of buildings throughout the country as a means of identification to the aviators. The Guggenheim Fund was favourably impressed by the suggestion, and further advocates the use of an arrow pointing due north and some system indicating the nearest airport. This suggestion has been made to the Department of Commerce, as well as an alternative suggestion to install a code system in mapping out the country for aviators, using the gummed fabric markers on tops of buildings to identify the town according to the Code, a copy of which each aviator would keep before him. The Department of Commerce is studying the feasibility of these suggestions. However, the Standard Oil Company of Ohio contracted with the manufacturer of these adhesive fabric letters to mark with the name of the town the roofs of its filling stations and storage plants in 272 towns in Ohio prior to the big air meet in Cleveland, August 27th. Colonel Lindbergh says that his cross-country flying has convinced him of the need of a system of aerial markings for the whole country.

TRAFFIC GUIDES

In May, 1927, one of the members of the Institute suggested that cotton fabrics could be used for placing upon highways letters and symbols made of cotton fabric as " guides " for traffic. A careful study convinced the Institute of the practicability of this plan. These guides are made of duck or drill, paint impregnated and coated on the back with double-treatment adhesive. These gummed words, arrows, strips, discs, etc., made in various sizes, are placed gum side down on streets and hard-surface highways. They have proved to be more economical than the old-time paint guides, and can be applied more quickly than paint, and with much less interference with the use of the highway. This gummed material is also used for safety markers on railroad station platforms and in subdividing storage space in warehouses. These traffic guides have proved economical and successful, and they represent an estimated potential annual market for 5,000,000 square yards of cotton goods.

CLEAVAGE CLOTH IN CONCRETE ROAD CONSTRUCTION

In July, 1927, the Institute learned that a cleavage cloth, not of cotton, was being used in concrete road construction. This use called for a loose-mesh fabric, which is laid over a cement base and the surface of the road moulded on it. Such a fabric, pervious to the fine mortar used as tops of concrete roads but practically impervious to the coarser aggregate used as road base, provides a cleavage plane between the surface of the road and the foundation, so that when repairs are necessary the top layer of the roadway can be removed and a new surface laid down without impairing the road foundation. Specifications and requirements of fabric then being used were sent to the Institute's research associate at the United States Bureau of Standards in Washington for study as to the possibility of producing a satisfactory cotton fabric for this use. As a result a cotton fabric was produced which was presented to and approved by the highway engineers concerned. This fabric has been used satisfactorily in test sections of roads.

Concrete highway construction has an estimated potential market of 5,000,000 square yards within the next five years. Interest in the development of this use has been widespread, and publicity articles on it have been carried not only in America, but in England, Germany, Belgium and Canada as well.

COTTON FABRICS IN TOP SOIL ROAD CONSTRUCTION

Learning that certain experiments involving the use of cotton fabric on rural roads were being carried on in South Carolina, the Institute made an investigation during the summer of 1927. The results indicated that rural roads having light traffic can be improved quickly, cheaply and successfully by the use of a cotton-fabric membrane combined with tar, asphalt and sand. The road is first made smooth by scraping or dragging, after which a prime coat of light tar is applied and allowed to " set " overnight. Then a seven-ounce open-weave cotton fabric, made of a four-ply yarn, count three and a half by seven, is spread over the sticky tar. Hot asphalt is applied to the top of the fabric and then covered with coarse sand, after which the road is ready for immediate use. The fabric is generally used only on a strip about a yard wide on each side of the road which is the part receiving the hardest wear. Information regarding this novel use of cotton fabrics was broadcast by the press in the United States, Canada, England and India.

In September, 1928, a representative of the Institute inspected an experimental section of State highway, comprising one and one-quarter miles, constructed with this membrane, some of which has been in operation a year. Its success is evidenced by the fact that South Carolina in September, 1928, announced its intention to improve 70 miles of highway by this process within the next two years. The Bureau of Good Roads, United States Department of Agriculture, estimates there are approximately 3,000,000 miles of unimproved rural roads in the country, each mile of which, if improved by this method, would require a minimum of 3,500 square yards of fabric.

COTTON CONTAINERS

It is estimated that 500,000,000 square yards of cotton fabrics are consumed annually in the manufacture of bags and other containers, and it is believed that this field offers a large potential market which can be realized if cotton manufacturers will study the requirements and work to meet the needs peculiar to each branch of the bag-consuming market. In some instances this would require the development of particular qualities for the bags; e.g., in rice bags, a fabric that would close easily over the hole made by the " tryer " in sampling; in cotton-seed meal, a good stretch to allow better transportation on the farmers' wagons; in many industries a fabric with as much resistance as possible to attacks of vermin; in some industries a fabric that permits of free ventilation of the products; and, for practically all uses, a strong cotton fabric that can be produced at a price low enough to be competitive with other baggings used. A great deal of consideration has been given from the beginning to this use of cotton fabrics, and in December, 1927, the Institute prepared a pamphlet—" Bags and Bagging "—giving the results of the investigations. This report contained data as to the advantages of using cotton, its consumption, competing fibres and potential markets. Close working relations have been maintained with the Textile Bag Manufacturers' Association, so that the Institute's activities might supplement in every way possible the sales promotional campaign of that Association, which has been directed toward the increased use of cotton containers for cement, the use of cotton bags for laundry supplies, and the use of cotton bags for retail packaging at the source of supply for such articles as soap chips, potatoes, etc.

OTHER USES OF COTTON

The examples of studies of industrial uses just cited represent part of the Section's work in this particular field. It is recognized that there are a great many other opportunities where new and extended uses of cotton can be developed. For example, it is estimated that cotton baling for piece goods represents a potential annual demand of about 22,000,000 square yards of cotton fabric; cotton baling for cotton, which is an economic problem surrounded by a great variety of important considerations to the farmer, the shipper and the manufacturer, represents a potential annual market for 80,000,000 square yards. It is believed that manufacturers of awning fabrics have potential markets in the United States of upwards of 6,000,000 square yards greater than their present annual demands. There are also very large opportunities to create greater markets for osnaburg, both in the industrial field and also in more strictly household uses, such as decoration, furniture covers, draperies, etc.

Many additional subjects have been studied by the Section, and while the information has not been developed sufficiently to receive special reports such data as have been gathered are at all times available to Institute members who are interested in any particular use or special study.

III.

CONSUMER EDUCATION

From the very beginning this Section has been in close touch with the consuming public. It co-operates with the Department of Agriculture, which, through its home economics work, reaches adult women representing 400,000 homes, and with over 600,000 girls of high school age in every state of the Union. Altogether over a million girls and young women in America receive instruction in home economics in universities, normal schools, high schools, and graded schools, and the Institute has assisted materially in bringing to them the advantages of cotton fabrics for present uses, as well as various unique household uses.

By request last year the Institute presented cotton fabrics and their uses to State leaders in home economics in several States, and requests have been received from 25 States for the Institute to assist in forming their 1929 State home economic programmes, and to send a speaker for their State meetings. Such opportunities are gladly taken advantage of in so far as the Institute's facilities will permit.

Merchandising managers and members of training departments in department stores, chain stores and mail-order houses are increasingly calling upon the Institute for material to be used in educating their salesmen along cotton textile lines and in formulating their advertising programmes for cottons. Pattern companies, fashion editors, stylists, all department editors, and also editors of farm papers and testing laboratories connected with such publications frequently call upon the Institute for information concerning cottons.

Trade associations in other industries are advised of the advantages and varied uses of cotton goods, and the Institute assists them in obtaining cotton textiles to meet the particular requirements of their industries.

GROUP PROMOTIONAL WORK

At the present time the Institute is engaged in special promotional work in behalf of styled cotton goods, bed sheets, bags and bagging. Because such work is confined to special branches of the industry it is financed by producers and distributors of the particular type of product rather than from the general funds of the Institute.

STYLE PROMOTION

Gratifying progress in promoting a new and strong style trend in cotton has been made as a result of the Institute special promotional work conducted by the Section during the past six months. This new service, which gives the industry for the first time a comprehensive group advertising and promotional campaign in behalf of styled cotton goods, began in the early summer of 1928. A careful survey by the Institute then indicated clearly that cotton fabrics were gaining a greatly increased importance in style, that more cotton dresses were being worn that summer than in the previous year, and that a still larger demand was anticipated for 1929. The results of this study were distributed widely to our members and throughout the industry, and received extensive notice in newspapers and trade publications.

Being strongly of the opinion that the Institute should organize to make further use of this encouraging development, steps were immediately undertaken to raise a sufficient fund within the industry to undertake a nation-wide sales promotional campaign.

THE BUDGET

After a thorough canvass of Institute members, selling houses, finishers, and others interested in promoting the demand for styled fabrics, a special budget was underwritten for this campaign. Assessments were based on the value of billings in 1927, deducting therefrom any expenditure for purchases of grey goods.

The first announcements of this new service were published February 4th, 1929. These stated that the Institute would seek during the present season to gather and disseminate the most important highlights of fashion news and developments affecting the demand for styled cotton goods—both ready-to-wear apparel and piece goods. It was recognized that the volume of pertinent style information was growing so rapidly that it would be difficult for both manufacturers and distributors, as well as stylists, designers and individual consumers, to be intelligently informed unless these developments were oriented and presented definitely from a cotton standpoint.

ADVERTISING

Most of the advertising space was taken in trade publications with a view to enlisting the active interest and support of other intermediate elements of the trade in the growing trend to cotton. As a means of presenting style information to consumers advertising space was taken in selected fashion magazines of national circulation.

STYLE BULLETIN

To reach cutters, dress manufacturers, wholesale and retail distributors, stylists, designers and others with more detailed information as to cotton style news, a style bulletin, known as "Flashes of Fashion," has been published and widely distributed. At the present time its circulation is in excess of 18,000, and this information has been particularly helpful in enlisting the interest of advertising and merchandise managers of retail stores throughout the country.

SWATCH SERVICE

Another feature of this special style service has been the preparation and distribution of books of selected samples called "swatches." Two of these swatch books of outstanding fabrics have been selected by a jury of fabric experts outside the industry, and this service has been particularly valuable in showing wholesale and retail distributors the progress which the industry has made in styling and designing.

STYLE EXHIBITS

From time to time special exhibits have been arranged in connection with important style shows to present selected models of cotton dresses. Supplementing all these activities the Institute has maintained an extensive information service for assisting retail merchants, fashion writers and others interested in any special fashion in behalf of cotton.

TRADE INTEREST

Publications devoted primarily to the interests of the industry have been alert and most responsive to the fashion trend in cottons which has been made prominent by our promotional service. Fashion editors, stylists and special writers have also taken an exceptional interest in this development.

RETAIL PROMOTION

Paralleling the efforts of the Institute to promote style demand, it has been most encouraging to see cottons displayed and advertised more prominently this year in and by American shops than in many years past. Evidence of this has come to us in the form of magazine and newspaper advertising of retail stores throughout the country. This exceptional volume of spontaneous and sustained promotion by individual stores has given further emphasis and impetus to the industry's own advertising.

COMMITTEE ON STYLE

The New Uses Section confers with an informal committee representing six mills and selling agencies producing and selling styled fabrics on such matters as surveys, conferences, exhibitions, style shows, etc. The advice of this committee has been of particular value in determining the extent of the Institute's co-operation with other organizations in presenting and sponsoring styled fabrics.

STYLE CONFERENCE, ETC.

In October, 1928, the New Uses Section sponsored a novel trade conference and style show, at which mills and selling agents co-operated in exhibiting cotton dresses of a lower price range. Seventy-five especially designed dresses were shown on manikins to more than 500 dress manufacturers, buyers, mill representatives, fashion authorities and others. This resulted in increased business, and a second conference similar in nature, and probably even larger in scope, is to be held in September, 1929. The Institute was instrumental in May, 1928, in presenting cottons at a special exhibition conducted by the largest department store in New York City.

It has also assembled and sponsored special exhibits at other important public occasions, such as the exposition of Women's Art and Industries in New York City, the Tri-State Fair and National Cotton Show in Memphis, Tennessee, and the seasonal style show of the Garment Retailers of America.

In January, 1929, the Institute's group of cotton models at the style show of Garment Retailers of America was the first cotton section which had ever been included in such a show. All garments exhibited on this occasion were made to sell at not less than $22.50 each wholesale, and the show was attended by more than 2,800 stylists, garment manufacturers and buyers from all parts of the United States.

In addition to these more formal exhibits, the Institute co-operated in having cotton dresses and fabrics presented at various meetings of clothing specialists, teachers, extension workers, and others. It has also presented by request typical cottons and dresses to the buying organizations of chain stores, such as Sears Robuck & Co., J. C. Penny Co., Inc., Montgomery Ward, and to many editors, designers, stylists, garment manufacturers, etc.

It is generally recognized that much of the merchandising success of styled cottons this season has been a result of the substantial advance which the mills have made in texture, styling and design. That the industry has made distinct progress in this direction is indicated by the fact that stylists and fashion authorities within the past year have turned to cottons with enthusiasm and genuine interest, which have brought about their rediscovery in the field of fashion. It is also interesting to find opinion growing to a point which recognizes that the marked advancement in the design and finish of cottons has put them on a style parity with other fabrics. As a result we find consumer interest aroused more by emphasis upon smart styling than by an intimate knowledge of the fabrics themselves.

The position of cottons in the field of high style has been further enhanced by designing cottons to emphasize their distinctive qualities of coolness, comfort and cleanliness. The mere fact that certain fabrics and garments are fashionable this season does not guarantee that they will be fashionable next year, or three years from now, unless they are made so. This new prestige has been felt in a very general stimulation of demand for other types of styled cottons in so-called volume markets. In this connection it should be pointed out that the industry is fully alert to the necessity for maintaining cotton in a prominent position in the high-styled field in order to make this market a precursor and a leader of the volume market, and thus maintain a high position in the entire field of styles.

These advances in style and design, and the large volume of advertising featuring cottons this year, have found response in a greater consumer interest and correspondingly larger demand for many cotton fabrics printed and woven.

Reports from printers of cotton fabrics show that in the first six months of 1929 500,446,000 yards were printed. This represents an increase of approximately 26 per cent. over the volume of goods printed in the corresponding period of 1928.

Latest available statistics from finishers show that in the first six months of 1929 898,245,000 yards of cotton goods were finished. This is an increase of 145,000,000 yards, or 19 per cent. more than the yardage printed in the corresponding period of 1928.

IV.

WIDE SHEETINGS

Studies as to what could be done to increase the consumption of wide sheetings through the use of longer bed sheets were undertaken by the Institute early in 1927. It is estimated that if the 108-in. sheet should become standard 20,000,000 more square yards of wide sheetings would be required annually in manufacturing the same number of sheets now sold.

A special article pointing out the advantages of 108-in. sheets was prepared by the New Uses Section and published in August, 1927. Fourteen thousand reprints were distributed to home economics teachers and women leaders throughout the country. A year later a pamphlet, "What Length Sheets?" setting forth in detail the advantages of longer sheets, was published, and 20,000 copies distributed to Institute members, newspapers, trade publications, wholesale and retail dry goods associations, laundries, home economics leaders, etc. The demand for this pamphlet was so great that later the wide sheetings manufacturers financed the printing of 25,000 additional copies, as well as 1,600,000 copies of a smaller size, which were distributed to consumers through department stores and laundries.

Results of this educational programme have been noted in reports from several stores, and one large mail-order house advised that it had included 108-in. sheets in its lines for the first time. A large department store advised that it had a marked increase in the demand for 108-in. as compared with the demand for 90-in. sheets, and that it was considering eliminating 90-in. sheets from its line. A commission house advised of a marked increase in its orders for 108-in. length. A large system of chain stores put out a pamphlet of its own advocating the use of 108-in. sheets. The United States Shipping Board and the United States Navy Department have recently bought large quantities of 108-in. sheets. The Navy Department advises that the 90-in. sheet will no longer be purchased for any use, and the Shipping Board advises that the 90-in. sheet is not used in its first and second class service.

Following two conferences participated in by the Institute, a simplified practice recommendation was promulgated in October, 1927, by the Department of Commerce, making 99 ins. and 108 ins. the standard lengths for bed sheets in hospitals and institutions. The Standing Committee for this simplification project is now carrying on a resurvey of the consumer requirements with a view to determining the advisability of recommending the 108-in. sheet as a single standard of length. Returns to date are greatly in favour of such a recommendation.

V.

NARROW SHEETINGS

During the past summer the Institute has arranged for manufacturers and selling agents of narrow sheetings to co-operate in a special programme to promote a greater use of bagging constructions. A man experienced in narrow sheetings and promotional work has been added to the staff to devote his entire time to this activity.

VI.

It is felt that the success of the Institute's special efforts to promote the demand for styled cottons this year has been conclusive enough to demonstrate to other branches of the industry the importance and value of such work. What has been done for styled cottons and for promoting longer sheets is at the outset a work which carries an important psychological effect. In every instance it is not yet possible to measure direct returns, although in connection with styled goods it has been definitely established that the industry this year will see a very important increase in the volume of this particular business. We believe that the benefits accruing through this branch of the industry will be helpful to other branches which are not directly concerned with styled goods.

Steps are now under way to assure the Institute of the necessary support to enable the style promotional campaign to be continued and enlarged in its scope next year. It is hoped that other groups will be disposed to follow the example of the three which are now doing this work, so that eventually the industry will be engaged in a comprehensive and co-ordinated effort to increase the use of all kinds of cotton textiles.

Such work would mean direct benefits to the mills, their employees and stockholders, and also very substantial benefits to those other elements of the cotton industry which are concerned with the production of cotton.

ARTIFICIAL COTTON.

As we frequently receive inquiries about the prospects of the much advertised artificial cotton, which is stated to be grown in England, Spain, Portugal and some other countries, we reproduce the following result of a scientific investigation of the fibre, as published recently in the *British Journal of the Textile Institute*: Photomicrographs of artificial cotton show that this fibre has the chief characteristics of bast fibres. The individual cells are of a spindle shape, with a cell length varying in great degree. A maximum fibre length of 1½ins. and a minimum of ⅛in. have been observed. Over a large number of specimens it is probable that the average length of fibre would be approximately ¾in. The fibres possess a well-marked lumen or intercellular cavity, and are all attenuated towards each end, and as the lumen approaches the apices it gradually disappears until the cell apices are apparently solid cellulose. The laminated structure of the fibres, as viewed in cross section under very high magnification after special treatment, suggested that there was a very intricate fibrillar structure similar to cotton. The cross sections vary in diameter from 18 to 35μ. The sectional diameter varies greatly when taken throughout the whole length. The average breaking strain is 102 grains, which is about 23 per cent. weaker than the average cotton hair and 49 per cent. weaker than the East Indian variety of cotton, which this fibre mostly resembles. The fibre does not possess any of the qualities required for successful manufacturing and finishing.

Comparisons of International Cotton Grey Cloth Prices.

We reprint below Bulletin 51G. of the Textile Division of the Department of Commerce, Bureau of Foreign and Domestic Commerce, Washington, dated 10th July, 1929, as it is extremely instructive, showing as far as it is humanly possible a comparison of the prices of cotton grey cloth in New York and similar cloths in Manchester during the first six months of 1929 and previous years. Similar comparisons between British India and Egypt are appended.

It would seem that there are long periods where the United States are cheaper than Lancashire for the same or very similar goods, and this in spite of the higher wages that are being paid in U.S.A. The explanation seems to lie in the fact that the double-shift working and the general adoption of automatic looms have cheapened America's cost of production to such an extent that the higher wages are counteracted by the higher production per loom. It will be seen that since August 13, 1929, prices in Manchester are again below the level of those of New York.

PRICES OF COTTON GREY CLOTHS IN NEW YORK AND MANCHESTER DURING 1929.

Prices of representative cotton grey cloths in both the New York and Manchester markets fluctuated within a comparatively narrow range during the first half of 1929, according to the Textile Division's compilation of international prices of cotton grey cloths. The New York average of seven representative cotton grey cloths was 38.70 cents per pound at the beginning of the year and 35.69 at the end of June, while comparable Manchester averages were 38.11 cents and 36.74 cents, respectively. The peak price of the period (38.96 cents in New York and 38.30 in Manchester) was registered on March 19th. The average for the first six months of 1929 was 37.38 cents per pound for American cloths and 37.58 for British, compared with 39.07 and 38.38, respectively, for the first half of 1928. The average price of middling spot cotton in ten designated markets (Norfolk, Augusta, Savannah, Montgomery, Memphis, Little Rock, Dallas, Houston, Galveston, and New Orleans) for the first half of 1929 was 18.84 cents per pound. The margin between the price of one pound of raw cotton and the price of one pound of cloth for the half year, therefore, averaged 18.54 for New York and 18.74 for Manchester.

PRICES OF INDIVIDUAL CLOTHS IN NEW YORK MARKET.

Prices of the individual cloths, on which the New York average is based, were as follows for the first half of the years 1926 to 1929, inclusive:

AVERAGE PRICE PER POUND OF REPRESENTATIVE COTTON GREY CLOTHS ON THE NEW YORK MARKET.

	Six months ended June 30,			
	1926	1927	1928	1929
Sheetings :—	Cents	Cents	Cents	Cents
40-in., 44 x 40, 4·25-yd.	36·23	29·85	32·98	31·57
36-in. 56 x 60, 4-yd.	38·38	32·08	36·13	34·21
36-in. 48 x 40, 5·50-yd. .	37·21	30·83	35·22	33·56
Print Cloths :—				
39-in. 80 x 80, 4-yd. . .	45·70	39·92	43·37	41·69
39-in. 72 x 76, 4·25-yd.	43·32	38·33	42·09	40·77
39-in., 68 x 72, 4·75-yd. . .	43·25	37·96	41·32	39·66
28-in., 64 x 60, 7-yd.	42·07	37·59	42·41	40·22
Average	40·88	35·22	39·07	37·38

Note.—The average construction of these seven cloths is as follows :—36·7 ins. in width, 62 x 61, and 4.82 yds. or 4·91 sq. yds. to the pound.

EFFECT OF EXCHANGE FLUCTUATIONS ON MANCHESTER PRICES NEGLIGIBLE.

When the Textile Division began the compilation of these prices in 1922, the British pound sterling was considerably below par. The average price of the Manchester cloths for the first half of 1922 was 45.50 cents per pound when converted at the par value of the pound sterling and 40.68 cents when account was taken of exchange fluctuations. The depreciated pound sterling, therefore, gave British manufacturers a decided advantage at that time in competition with American manufacturers in world markets. According to the Textile Division's records, the value of the British pound sterling (based on exchange rates for Tuesday) was for the first six months of the year specified as follows: 89.4 per cent. of par in 1922; 95.7 per cent. in 1923; 88.6 per cent. in 1924; 98.7 per cent. in 1925; 99.93 per cent. in 1926; 99.74 per cent. in 1927; 100.23 per cent. in 1928; and 99.73 per cent. in 1929. Since 1926 exchange fluctuations have had a negligible influence on British cotton cloth prices as indicated by the following table giving conversions, at the par value of the pound and at current exchange rates, for individual British cloths used in these comparisons:—

AVERAGE PRICES OF REPRESENTATIVE COTTON GREY CLOTHS ON THE MANCHESTER MARKET.

Price in cents per pound.

Prices converted at par value of £ Sterling.

	Six months ended June 30,			
Shirtings :—	1926	1927	1928	1929
	Cents	Cents	Cents	Cents
38-in., 72 x 64, 3·75-yd. ...	37·08	31·77	33·70	33·73
35-in. 64 x 56, 4·75-yd. ...	38·95	34·63	37·94	37·46
38-in. 60 x 56, 4·54-yd. ...	35·34	30·80	33·59	33·02
39-in. 64 x 60, 4·54-yd. . .	37·77	33·71	36·79	36·32
38-in. 52 x 44, 5·55-yd. ...	33·97	29·50	32·20	31·75
Printers —				
36-in. 76 x 88, 4·25-yd. ...	47·37	42·03	45·99	43·92
32-in., 68 x 68, 7·57-yd. ..	48·65	42·43	47·88	47·67
Average	39·87	34·98	38·29	37·69

Prices converted at current Exchange rates of £ Sterling.

Average Prices of Cotton Grey Cloths (Manchester Market)—*continued.*

	Six months ended June 30,			
	1926	1927	1928	1929
	Cents	Cents	Cents	Cents
Shirtings : -				
38-in., 72 x 64, 3·75-yd. .	37·05	31·69	33·77	33·63
35-in., 64 x 56, 4·75-yd. . .	38·92	34·54	38·02	37·35
38-in., 60 x 56, 4·54-yd. ..	35·31	30·72	33·66	32·92
39-in., 64-60, 4·54-yd. ...	37·74	33·62	36·87	36·21
38-in., 52-44, 5·55-yd. . .	33·94	29·42	32·27	31·66
Printers :—				
36-in., 76 x 88, 4·25-yd. .	47·34	41·92	46·10	43·79
32-in., 68 x 68, 7·57-yd. . .	48·61	42·32	47·99	47·53
Average	39·84	34·89	38·38	37·58

Note.—The average construction of these seven cloths is as follows :—36·6 ins., 65 x 62, and 4·99 yds. or 5·07 sq. yds. to the pound.

The average value of the British pound sterling for the first six months of the year specified (based on current exchange rates for Tuesday of each week) was as follows: 99.93 per cent. of par in 1926; 99.74 in 1927; 100.23 in 1928; and 99.73 in 1929.

WEEKLY AVERAGE PRICES IN NEW YORK AND MANCHESTER TABULATED.

The Textile Division obtains the prices of British cloths, used in this compilation, from the *Manchester Guardian.* This paper gives quotations for Tuesday, the day (it is claimed) when the most business is usually done. For comparable purposes, it was deemed advisable to take New York prices on the same date. Accordingly the prices, published as a weekly average, are actually based on Tuesday quotations. In the following table the dates given are for Tuesday of each week of 1929, except January 1st, a holiday. Prices for previous years are also based on Tuesday quotations.

To indicate the margins between the price of a pound of raw cotton and the price of one pound of cloth (representing the average of the seven cloths used) the Textile Division has added the Tuesday 10-market average price of middling spot cotton to the table of New York and Manchester cloth prices.

AVERAGE PRICES OF REPRESENTATIVE COTTON GREY CLOTHS IN THE NEW YORK AND MANCHESTER MARKETS during 1926 to 1929, inclusive, and the 10-MARKET AVERAGE PRICE OF RAW COTTON for 1929.

Prices in cents per pound.

Date		New York Average price of 7 grey cloths				Manchester Average price of 7 grey cloths				10-market average price of middling spot cotton
		1926	1927	1928	1929	1926	1927	1928	1929	1929
		Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents
Jan.	2	43·61	33·67	40·46	38·70	41·21	32·74	37·97	38·11	18·65
	8	43·60	33·45	40·13	38·48	41·26	32·87	38·12	37·84	18·68
	15	43·82	34·22	39·80	38·36	41·32	33·15	37·70	38·21	19·06
	22	43·94	34·29	39·28	38·36	41·33	33·04	37·54	37·91	19·05
	29	43·94	34·54	38·86	37·90	41·34	32·94	36·94	37·74	18·67

Average Prices of Cotton Grey Cloths (New York & Manchester)- *continued.*

Date	New York Average price of 7 grey cloths				Manchester Average price of 7 grey cloths				10-market average price of middling spot cotton
	1926	1927	1928	1929	1926	1927	1928	1929	1929
	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents
Feb. 5	44·43	34·46	38·47	37·47	41·33	33·16	36·52	37·36	18·48
12	44·45	34·69	38·70	37·40	40·84	33·54	36·84	37·91	18·83
19	44·53	34·29	38·49	37·32	40·84	34·18	37·22	37·56	18·88
26	43·78	34·44	38·72	37·32	41·18	34·45	37·71	38·03	19·24
Mar. 5	43·23	35·26	38·77	37·93	40·90	34·77	37·71	38·17	19·99
12	41·33	35·09	38·52	38·86	40·80	34·47	37·70	38·27	19·96
19	41·80	35·09	38·52	38·96	40·41	34·48	38·14	38·39	19·65
26	40·49	35·16	38·77	38·88	40·27	34·49	38·54	38·19	19·34
April 2	40·32	34·94	38·73	38·18	39·08	34·49	38·54	38·13	19·37
9	39·75	34·85	38·65	37·87	38·82	34·48	38·96	38·19	19·43
16	39·31	34·85	38·65	37·75	38·83	34·49	38·98	38·16	19·20
23	40·53	34·95	38·89	37·60	38·59	35·00	38·94	37·78	18·53
30	38·91	35·37	39·99	36·97	(1)	35·25	40·01	37·10	17·92
May 7	38·77	35·62	40·17	36·54	(1)	35·19	40·02	37·02	18·14
14	38·69	35·76	39·91	36·47	38·74	36·09	39·45	36·85	18·12
21	38·29	35·92	39·59	36·16	38·73	36·74	39·37	36·84	18·54
28	37·62	36·66	39·15	35·69	38·78	37·51	39·38	36·56	18·36
June 4	37·65	36·88	38·60	35·76	38·79	37·50	39·36	36·54	18·59
11	37·16	36·94	38·25	35·65	37·67	37·50	39·16	36·65	18·46
18	36·23	37·18	38·26	35·69	37·58	37·49	39·20	36·74	18·44
25	36·21	37·18	39·63	35·69	37·58	37·13	37·93	36·74	18·21
July 2	36·15	37·53	40·10	35·69	37·09	37·87	39·98	36·28	17·93
9	36·78	37·53	40·00	35·77	37·70	38·60	39·92	36·67	18·27
16	37·47	38·47	40·07	35·70	37·61	38·83	39·52	36·28	18·09
23	37·74	39·45	40·00	36·38	38·23	39·36	38·97	36·86	18·50
30	38·31	39·66	40·00	36·94	38·17	39·06	38·88	37·02	18·52
Aug. 6	38·32	40·97	39·00	36·94	37·84	40·66	37·94	37·63	18·55
13	38·15	41·37	38·38	37·11	38·43	40·01	37·28	36·46	17·87
20	38·56	43·09	38·42	37·23	38·98	40·87	37·18	37·02	18·13
27	39·23	45·49	38·34	37·32	38·97	42·02	37·18	36·61	17·94
Sept. 3	39·82	45·76	38·41	37·39	38·96	42·01	37·65	36·36*	18·68
10	39·43	46·87	37·74	37·49	38·88	41·36	36·50	36·35*	18·09

* Cabled prices subject to confirmation.

Note.—The 10-market average price of middling spot cotton is based on prices in the following markets : Norfolk, Va.; Augusta and Savanna, Ga.; Montgomery, Ala.; Memphis, Tenn.; New Orleans, La.; Little Rock, Ark.; and Dallas, Houston, and Galveston, Texas.

BRITISH INDIA.

India ranks as one of the world's largest consuming markets for cotton cloth, but it is difficult to estimate the actual amount of goods used because of the large output of the cottage industry. For the year ended March 31, 1929, Indian weaving mills reported a production of 1,893,000,000 yards of cotton cloth and imports of cotton piece goods amounted to 1,937,000,000 yards. Exports and re-exports of cotton aggregated approximately 400,000,000 yards, leaving a balance of 3,430,000,000 yards of mill-made goods available for consumption in India during the period under discussion. In addition probably 1,000,000,000 yards of hand-loom products are used annually. Because of the size and importance of the Indian market, the Textile Division compiles average prices for both domestic and imported cloths.

Prices of domestic piece goods in Bombay are supplied fortnightly to the Textile Division by the Bombay Mill Owners' Association, and are based on Indian-made cloths (2 longcloths, 1 shirting, 1 T-cloth, and 2 domestics), averaging 31½ ins. in width, about 96 threads in warp and filling to the square inch, and 4.65 yards to the pound. Fortnightly prices for 1929 and the corresponding periods of 1928, converted at prevailing exchange rates of the rupee, were as follows:—

Date Two weeks ended	Price per pound 1928 Cents	 1929 Cents	Date Two weeks ended	Price per pound 1928 Cents	 1929 Cents
Jan. 4	33·50	35·04	April 26	33·04	34·58
Jan. 18	33·77	35·02	May 10	33·63	34·58
Feb. 1	33·69	34·94	May 24	33·95	34·46
Feb. 15	32·94	34·83	June 7	34·19	34·52
Mar. 1	33·28	34·75	June 21	33·82	34·45
Mar. 15	33·22	34·66	July 5	34·51	34·19
Mar. 29	33·11	34·94	July 19	34·91	34·10
April 12	33·02	34·72			

The prices of the individual cloths, used for the Bombay average, were as follows during the first six months of 1928 and 1929:

AVERAGE PRICES OF INDIAN-MADE CLOTHS IN BOMBAY DURING FIRST HALF OF 1928 AND 1929.

Cloth	Width in inches	Sum of threads in warp and filling	Yards per pounds	6 months ended June 30, 1928 Cents	 1929 Cents
Longcloth	37	81 to 85	5·17	35·35	36·16
Longcloth	37	96 to 100	4·17	34·56	35·50
Shirting	35	88 to 90	4·22	33·23	34·17
T-cloth	30	about 102	4·00	32·15	33·80
Domestic	24	102 to 112	4·80	33·26	34·50
Domestic	26	about 94	5·54	32·33	34·22
Average ...	31½	96	4·65	33·48	34·73

Calcutta quotations, used in the Textile Division's compilation, are based on six imported grey shirtings, average 37.7 inches in width, 69 by 65, and 4.42 square yards to the pound. Madras prices are calculated on eight grey cloths (five shirtings, two dhooties and one jaconet), all imported, averaging 46 ins. in width, 64 by 54, and 5.26 square yards to the pound. Quarterly average prices of imported goods in Calcutta and Bombay, converted at the prevailing rates of exchange for the periods in question, and recent quotations are given in the following table:—

Quarter 1928	Price per pound Calcutta Cents	 Madras Cents	Quarter 1929	Price per pound Calcutta Cents	 Madras Cents
Jan.–March ...	39·19	56·55	June 1	39·15	54·14
April–June ...	39·43	55·25	8	39·05	54·00
July–Sept. ...	39·30	54·22	15	39·01	53·95
Oct.–Dec. ...	39·65	54·48	22	39·07	54·03
1929			29	39·07	54·03
Jan.–March ...	39·51	54·27	July 6	39·01	53·26
April–June ...	39·13	54·11	13	38·99	53·23
			20	38·99	53·24
			27	38·98	53·23

Egypt:—

Prices of a Three-yard Japanese Sheeting in Alexandria.

The following table gives average weekly quotations for imported spot goods, in transit at Port Said, for a 36-inch, 46 by 46, three-yard Japanese grey sheeting, weighing about 13 pounds per 40-yard piece. These spot prices are for goods in bonded warehouses and include all costs of unloading, porterage, and warehouse charges incidental to delivery. The price, however, does not include customs duty, insurance, nor storage charges which may accumulate while the goods are in bonded warehouses. Prices for the first six months of 1928 and 1929 follow:

SPOT PRICES PER PIECE OF 40 YARDS.

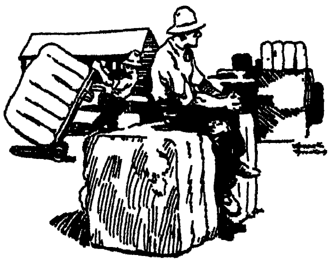
Week ended	1928	1929	Week ended	1928	1929
Jan.–Mar. average	3·56	4·00	June 15 ...	3·59	3·78
April 6	3·63	3·96	June 22 ...	3·59	3·78
April 13	3·59	3·95	June 29 ...	3·72	3·76
April 20	3·58	3·96	July 6 ...	3·82	3·76
April 27	3·59	3·92	July 13 ...	3·78	3·78
May 4	3·65	3·92	July 20 ...	3·71	3·80
May 11	3·65	3·90	July 27 ...	3·67	3·80
May 18	3·62	3·90	Aug. 3 ...	3·58	3·82
May 25	3·60	3·88	Aug. 10 ...	3·63	4·02
June 1	3·60	3·86	Aug. 17 ...	3·65	4·06
June 8	3·58	3·80	Aug. 24 ...	3·72	4·08

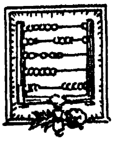
The average quotation for three-yard Japanese grey sheeting was $3.88 for the quarter ending June, 1929, as compared with $4.00 for the quarter ending March, 1929. The average for the half-year ending June, 1929, was $3.94, in comparison with $3.59 for the corresponding period of 1928.

W. W. Carman, Jr.,
Acting Chief, Textile Division.

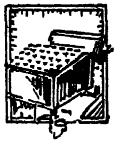
WANING POPULARITY OF RAYON HOSIERY.

In view of the discussions at the Barcelona Cotton Congress it is interesting to read in the London Trade report of the *Manchester Guardian Commercial*, 31st October, that "the popularity of rayon hose appears definitely to be declining, many women now preferring silks and fine-gauge cotton lisles."





INTERNATIONAL COTTON STATISTICS



The present tabulation is the final result of the census of cotton consumption in the cotton-spinning mills of the world for the year ended 31st July, 1929, and of cotton mill stocks on that day. It should be borne in mind that the figures published herewith relate to raw cotton only and do not contain linters or waste cotton of any kind whatsoever.

As generally a few mills send in their returns after the publication of the preliminary result, these will be taken into consideration in compiling the final issue, which will be found in the next issue the INTERNATIONAL COTTON BULLETIN.

The total world's cotton mill consumption for the year ended 31st July, 1929, compared with the same period of the previous year, is as follows:—

	31st July 1929 bales	31st July 1928 bales	Increase or Decrease over previous year bales
American Cotton	15,076,000	*15,407,000*	− 331,000
East Indian Cotton	5,178,000	*4,523,000*	+ 655,000
Egyptian Cotton	989,000	*956,000*	+ 33,000
Sundries	4,639,000	*4,654,000*	− 15,000
All kinds of Cotton	25,882,000	*25,540,000*	+ 342,000

The total world's cotton mill stocks on 31st July, 1929, were:—

American Cotton:

Europe ..	730,000 bales *against*	*792,000 bales on 31st July, 1928.*
Asia	390,000 „ „	*327,000* „ „ „ „
America ..	905,000 „ „	*984,000* „ „ „ „

The total world's mill stocks of American cotton on 31st July, 1929, were 2,129,000 bales, as against 2,112,000 bales in the year 1928.

East Indian Cotton:

Europe ..	342,000 bales *against*	*290,000 bales on 31st July, 1928.*
Asia	1,395,000 „	*1,429,000* „ „ „ „

Altogether the world's mill stocks of East Indian cotton are 1,761,000 bales, against 1,728,000 twelve months ago.

Egyptian Cotton:

Europe ..	143,000 bales *against*	*116,000 bales on 31st July, 1928.*
Asia	19,000 „ „	*19,000 „ „ „ „*
America ..	62,000 „ „	*33,000 „ „ „ „*

The total world's mill stocks of Egyptian cotton are 228,000 bales, against 170,000 bales twelve months ago.

Sundry Cottons:

Europe ..	299,000 bales *against*	*340,000 bales on 31st July, 1928.*
Asia	241,000 „ „	*262,000 „ „ „ „*
America ..	145,000 „ „	*132,000 „ „ „ „*

The total world's mill stocks of all kinds of cotton on July 31st, 1929, were 4,863,000 bales, against 4,787,000 bales on July 31st, 1928.

Short Time. Owing to the different working hours existing in the various countries a comparison of the figures supplied as relating to the various countries would be misleading owing to the absence of any uniform basis. Whilst England has 48 hours as a normal week, other countries, though they may have a 48-hour week established by law, would regard 60 hours as the normal working week of the industry in consequence of their two or three shift system. China would probably consider about 150 hours as her normal working week. We give, however, the information supplied by each country, as it may be some guide of the state of trade.

Great Britain. The total number of spinning spindles existing is 55,917,000. This figure compares with 56,748,000 on January 31st, 1929; consequently there are 831,000 spindles less at the present time, due to mill fires and dismantling of machinery.

The 55,917,000 spindles are divided as follows:—

Normally engaged on American Cotton, etc.	38,433,000
„ „ on Egyptian Cotton	17,484,000
	55,917,000

Of the 38,433,000 spindles normally engaged on American cotton 2,915,000 have reported that they have been entirely idle throughout the period under review. In the Egyptian section only a negligible quantity has been stopped entirely throughout the half year, though the whole section was on short time.

The active spindles of Great Britain have curtailed their production by approximately 22½ per cent.

Germany. 1,127,855 spindles report having stopped 1,095 hours = 1,235,229,889 spindle-hours.

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ON

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(3) The Marketing of Cotton, Yarn and Cloth.

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France. The short time is equal to 48½ hours during the half year for the whole industry.

Italy. The spindle-hours reported as stopped are: 765,697,580.

Czecho-Slovakia. The spindle-hours worked are 3,889 millions against the normal 4,109 millions - 94.7 per cent.

Switzerland. 141,045 spindles stopped, spindle-hours 130,755,808.

Austria. 469,726 spindles stopped 288,640,183 spindle-hours.

Denmark. 3,145,560 spindle-hours stopped.

Japan. 3,667,613,748 spindle-hours stopped. Japan has been in the habit of including in the returns the spinners' stocks in port warehouses; other countries have not included them. In order to enable comparison with Japan's previous figures the spinners' stocks in port warehouses have again been included, the latter are also indicated separately in the table.

U.S.A. Out of the existing 34,829,000 spindles 30,396,000 were active on July 31st, 1929. The figures are supplied by the Bureau of the Census, Washington, D.C.

China. 283,951 spindles are reported to have been stopped for 1,013 hours. The consumption of Chinese cotton is 674,719 bales and the mill stocks of Chinese cotton are 168,050, both items are included in the sundries.

Russia. The sundry columns include for consumption 929,000 bales Russian cotton (6 bales per metric ton), 69,492 bales Persian cotton (8.72 bales per metric ton) and for the Stocks 156,000 bales Russian cotton and 34,000 bales Persian. The decrease in consumption of American cotton is noteworthy, also the increase in Russian and Persian cotton, shown in the sundries column. Out of the existing 7,464,700 spindles 7,233,707 were active.

ARNO S. PEARSE, *General Secretary.*

Manchester, September 2nd, 1929.

Estimated TOTAL WORLD'S COTTON MILL CON- with previous figures for comparison, on basis of Spinners'

	COUNTRIES	IN THOUSANDS OF ACTUAL BALES (regardless of weight)							
		AMERICAN				EAST INDIAN			
		Half-year ending				Half-year ending			
		July 31 1929	Jan 31 1929	July 31 1928	July 31 1927	**July 31 1929**	Jan. 31 1929	July 31 1928	July 31 1927.
	EUROPE :—								
(1)	Great Britain ..	**939**	971	922	1,137	**91**	92	74	34
(2)	Germany.. ..	**474**	550	599	649	**130**	122	117	78
(3)	France	**405**	419	422	406	**112**	105	102	68
(4)	Russia	**73**	317	117	123	—	—	—	—
(5)	Italy	**373**	372	365	338	**114**	111	98	78
(6)	Czecho-Slovakia	**181**	196	197	236	**49**	41	39	34
(7)	Belgium	**99**	120	102	116	**85**	90	83	54
(8)	Spain	**135**	156	163	151	**37**	37	30	26
(9)	Poland	**87**	123	145	125	**9**	14	12	13
(10)	Switzerland ..	**26**	27	29	27	**5**	4	4	3
(11)	Holland	**75**	76	73	70	**19**	18	18	12
(12)	Austria	**51**	52	58	66	**19**	21	16	13
(13)	Sweden	**45**	49	53	46	**1**	1	1	1
(14)	Portugal ..	**35**	21	22	26	—	1	—	—
(15)	Finland	**16**	18	20	18	—	—	—	—
(16)	Denmark ..	**11**	10	10	10	—	—	—	—
(17)	Norway	**4**	3	4	3	—	—	—	—
(18)	Hungary* ..	**15**	—	—	—	**5**	—	—	—
	Europe Total ..	**3,044**	3,480	3,301	3,547	**676**	657	594	414
	ASIA :								
(1)	India	**25**	27	21	290	**958**	922	840	1,018
(2)	Japan	**578**	522	506	619	**751**	737	565	716
(3)	China	**158**	121	146	161	**180**	218	200	201
	Asia Total ..	**761**	670	673	1,070	**1,889**	1,877	1,605	1,935
	AMERICA :								
(1)	U.S.A.	**3,483**	3,305	3,070	3,597	**25**	10	12	15
(2)	Canada	**115**	103	101	105	—	—	—	—
(3)	Mexico	—	—	—	—	—	—	—	—
(4)	Brazil	—	—	—	—	—	—	—	—
	America Total ..	**3,598**	3,408	3,171	3,702	**25**	10	12	15
	Sundries	**60**	55	36	38	**14**	30	9	14
	HALF-YEAR'S TOTAL ..	**7,463**	7,613	7,181	8,357	**2,604**	2,574	2,220	2,378

* Formerly included in Sundries.

SUMPTION for the Half-year ending 31st July, 1929, returns made to the International Cotton Federation.

IN THOUSANDS OF ACTUAL BALES
(regardless of weight)

EGYPTIAN				SUNDRIES				TOTAL				
Half-year ending				Half-year ending				Half-year ending				
July 31 1929	Jan 31 1929	July 31 1928	July 31 1927	July 31 1929	Jan. 31 1929	July 31 1928	July 31 1927	July 31 1929	Jan. 31 1929	July 31 1928	July 31 1927	
174	191	186	183	156	186	201	240	1,360	1,440	1,383	1,594	*(1)*
34	36	29	36	16	16	16	13	654	724	761	776	*(2)*
59	47	46	49	38	42	35	34	614	613	605	557	*(3)*
23	36	34	31	998	705	834	762	1,094	1,058	985	916	*(4)*
28	25	24	24	9	10	12	8	524	518	499	448	*(5)*
12	12	12	14	2	2	4	2	244	251	252	286	*(6)*
3	2	2	2	20	33	37	12	207	245	224	184	*(7)*
12	12	10	12	9	6	5	11	193	211	208	200	*(8)*
7	8	3	6	2	1	5	1	105	146	165	145	*(9)*
20	21	24	25	1	1	1	1	52	53	58	56	*(10)*
—	—	—	—	2	—	1	1	96	94	92	83	*(11)*
2	2	2	2	1	1	3	1	73	76	79	82	*(12)*
—	—	—	—	—	1	1	1	46	51	55	48	*(13)*
—	—	1	—	20	10	12	4	55	32	35	30	*(14)*
—	—	—	—	—	—	—	—	16	18	20	18	*(15)*
—	—	—	—	1	—	—	1	12	10	10	11	*(16)*
—	—	—	—	—	—	—	—	4	3	4	3	*(17)*
—	—	—	—	—	—	—	—	20	—	—	—	*(18)*
374	392	373	384	1,275	1,014	1,167	1,092	5,369	5,543	5,435	5,437	
2	1	1	1	33	29	24	30	1,018	979	886	1,339	*(1)*
21	19	20	23	75	63	128	50	1,425	1,341	1,219	1,408	*(2)*
—	—	—	—	675	605	901	558	1,013	944	1,247	920	*(3)*
23	20	21	24	783	697	1,053	638	3,456	3,264	3,352	3,667	
80	75	64	85	27	28	34	35	3,615	3,418	3,180	3,732	*(1)*
7	3	2	5	—	—	—	—	122	106	103	110	*(2)*
—	—	1	—	81	83	86	81	81	83	87	81	*(3)*
—	—	—	—	221	251	257	255	221	251	257	255	*(4)*
87	78	67	90	329	362	377	371	4,039	3,858	3,627	4,178	
8	7	6	8	68	111	88	70	150	203	139	130	
492	497	467	506	2,455	2,184	2,685	2,171	13,014	12,868	12,553	13,412	

Estimated TOTAL WORLD'S COTTON MILL STOCKS comparison on basis of Spinners' returns

	COUNTRIES	IN THOUSANDS OF ACTUAL BALES (regardless of weight)							
		AMERICAN				EAST INDIAN			
		Half-year ending				Half-year ending			
		July 31 1929	Jan. 31 1929	July 31 1928	July 31 1927	**July 31 1929**	Jan 31 1929	July 31 1928	July 31 1927
	EUROPE :								
(1)	Great Britain ..	**71**	91	79	122	**24**	16	24	17
(2)	Germany.. ..	**108**	140	135	220	**55**	43	48	31
(3)	France	**167**	154	144	148	**87**	60	69	41
(4)	Russia	**45**	12	52	161	—	—	—	—
(5)	Italy	**182**	148	143	148	**65**	49	51	33
(6)	Czecho-Slovakia .	**43**	54	50	64	**17**	13	13	9
(7)	Belgium	**41**	32	43	55	**55**	38	45	24
(8)	Spain	**20**	25	29	29	**9**	8	8	6
(9)	Poland	**11**	24	23	21	**8**	2	7	4
(10)	Switzerland ..	**14**	20	16	21	**5**	3	4	3
(11)	Holland	**30**	35	29	33	**15**	9	14	7
(12)	Austria	**12**	14	15	18	**5**	6	6	4
(13)	Sweden	**19**	19	21	25	**1**	1	1	—
(14)	Portugal	**4**	5	4	6	—	—	—	—
(15)	Finland	**6**	6	5	5		—		—
(16)	Denmark ..	**3**	3	3	3	—	—	—	—
(17)	Norway	**1**	1	1	1		—		—
(18)	Hungary* .	**3**	—	—	—	**1**	—	—	—
	Europe Total ..	**730**	783	792	1,080	**842**	248	290	179
	ASIA :								
(1)	India	**27**	41	63	117	**866**	667	864	684
(2)	Japan†	**311**	267	206	387	**424**	241	426	568
(3)	China	**52**	41	58	68	**105**	40	139	77
	Asia Total ..	**390**	349	327	572	**1,395**	948	1,429	1,329
	AMERICA :								
(1)	U.S.A.	**932**	1,698	931	1,325	**14**	9	5	4
(2)	Canada	**63**	104	53	69	—	—		—
(3)	Mexico	—	—	—	—	—	—		
(4)	Brazil	—	—	—	—	—	—	—	.
	America Total ..	**995**	1,802	984	1,394	**14**	9	5	4
	Sundries	**14**	24	9	10	**10**	11	4	3
	HALF-YEAR'S TOTAL ..	**2,129**	2,958	2,112	3,056	**1,761**	1,216	1,728	1,515

*Formerly included in Sundries.

†Including Spinners' Port Warehouse Stocks, viz., 76,547 bales American, 111,602 bales Indian, 2,391 bales Egyptian, and 9,841 bales Sundries.

on 1st August, 1929, with previous figures for made to the International Cotton Federation

IN THOUSANDS OF ACTUAL BALES
(regardless of weight)

EGYPTIAN				SUNDRIES				TOTAL				
Half-year ending				Half-year ending				Half-year ending				
July 31 1929	Jan 31 1929	July 31 1928	July 31 1927	July 31 1929	Jan 31 1929	July 31 1928	July 31 1927	July 31 1929	Jan 31 1929	July 31 1928	July 31 1927	
41	46	43	44	41	56	58	74	177	209	204	257	(*1*)
13	13	13	16	7	6	4	6	183	202	200	273	(*2*)
35	27	19	22	31	30	22	19	320	271	254	230	(*3*)
9	7	11	16	190	321	230	163	244	340	293	340	(*4*)
15	13	9	11	5	5	4	2	217	215	207	194	(*5*)
5	5	4	4	1	1	1	1	66	73	68	78	(*6*)
2	2	1	2	14	11	11	3	112	83	100	84	(*7*)
6	4	4	5	3	2	3	2	38	39	44	42	(*8*)
2	2	1	1	1		1	1	17	28	32	27	(*9*)
14	16	10	17	2	1	2	2	35	40	32	43	(*10*)
--				1		1	2	46	44	44	42	(*11*)
1	1	1	1	1	1		-	19	22	22	23	(*12*)
—				-	1	1	1	20	21	23	26	(*13*)
—			-	2	4	2	2	6	9	6	8	(*14*)
—					-	—	—	6	6	5	5	(*15*)
—		—			-	—	—	3	3	3	3	(*16*)
—	—	-	—	—	-	—	-	1	1	1	1	(*17*)
—	—	—	--	—	—	—	—	4	—	—	—	(*18*)
143	136	116	139	299	439	340	278	1,514	1,606	1,538	1,676	
4	1	2	2	39	14	35	23	986	723	964	826	(*1*)
14	9	17	24	34	35	46	22	788	552	695	1,001	(*2*)
1			1	168	258	181	92	326	339	378	238	(*3*)
19	10	19	27	241	307	262	137	2,045	1,614	2,037	2,065	
60	30	32	30	19	19	25	19	1,025	1,756	993	1,387	(*1*)
2	2	1	2	—	—	-	—	65	106	54	71	(*2*)
—	—	-		36	36	45	62	36	36	45	62	(*3*)
—	—	—	—	90	67	62	99	90	67	62	99	(*4*)
62	32	33	41	145	122	132	180	1,216	1,965	1,154	1,619	
4	4	2	3	60	70	43	31	88	109	58	47	
228	182	170	210	745	938	777	626	4,863	5,294	4,787	5,407	

ESTIMATED TOTAL WORLD'S COTTON
years 31st July, 1929, and 31st Jan., the International Cotton

COUNTRIES	Total Estimated Number of Spinning Spindles		Mule Spindles	
	Half year ended		Half-year ended	
	July 31, 1929	Jan 31, 1929	July 31, 1929	Jan 31, 1929
Europe:				
Great Britain*	55,917	56,748	42,776	43,310
Germany	11,250	11,155	4,630	4,630
France	9,880	9,785	3,441	3,496
Russia†	7,465	7,357	2,597	2,597
Italy	5,210	5,227	678	654
Czecho-Slovakia	3,673	3,661	1,675	1,681
Belgium	2,156	2,112	451	461
Spain	1,875	1,909	10	10
Poland	1,557	1,569	430	462
Switzerland	1,504	1,503	675	677
Holland	1,160	1,154	251	251
Austria	955	1,046	353	410
Sweden	626	628	95	98
Portugal	503	503	173	173
Finland	262	259	46	45
Denmark	99	99	5	5
Norway	60	54	13	13
Hungary‡	153	—	29	—
Total	104,305	104,769	58,328	58,973
Asia:				
India	8,704	8,704	897	897
Japan	6,530	6,436	42	41
China	3,602	3,526	—	—
Total	18,836	18,666	939	938
America:				
U.S.A.§	34,829	35,335	1,584	1,584
Canada	1,240	1,181	200	208
Mexico	751	840	37	—
Brazil	2,750	2,610	3	3
Total	39,570	39,966	1,824	1,795
Sundries	1,500	1,703	200	382
Grand total	164,211	165,104	61,291	62,088

*Approximately 3 million spindles were idle throughout half the year and the others worked 22.5 per cent. short time.

†7,233,707 spindles were active, the division between mules and rings has not been given by the Soviet.

‡Formerly in Sundries.

§U S A.—The division between mule and ring and the number of spindles on Egyptian are only approximate. On July 31, 1929 30,396,000 spindles were active.

SPINNING SPINDLES (000's omitted) for the half-
1929, on basis of returns made to
Federation's Statistics.

Ring Spindles		Spinning Spindles Egyptian Cotton		Spindles in Course of Erection	
Half-year ended		Half-year ended		Half-year ended	
July 31, 1929	Jan. 31, 1929	July 31, 1929	Jan. 31, 1929	July 31, 1929	Jan 31, 1929
13,141	13,438	17,484	17,929	47	77
6,620	6,525	1,074	1,214	74	140
6,439	6,289	2,400	2,150	62	91
4,868	4,760	225	300	300	—
4,532	4,573	833	676	117	158
1,998	1,980	527	462	—	9
1,705	1,651	26	31	3	22
1,865	1,899	130	120	—	—
1,127	1,107	270	232	?	16
829	826	709	829	13	58
909	903	—	—	—	3
602	636	42	47	—	—
581	530	13	10	6	15
330	330	10	10	—	2
216	214	6	10	—	—
94	94	—	—	—	—
47	41	—	—	—	—
124	—	5	—	25	—
45,977	45,796	23,754	24,020	647	591
7,807	7,807	9	3	30	58
6,488	6,395	652	170	30	118
3,602	3,526	—	—	18	6
17,897	17,728	661	173	78	182
33,245	33,751	2,000	2,000	?	?
1,040	973	24	34	30	—
714	840	5	—	2	3
2,747	2,607	—	—	12	12
37,746	38,171	2,029	2,034	44	15
1,300	1,321	134	120	20	87
102,920	103,016	26,578	26,347	789	875

SPECIFICATION OF PART OF THE COTTON RETURNED AS "SUNDRIES" (IN ACTUAL BALES)

Six Months ending 31st July, 1929, calculated from Actual Returns

CONSUMPTION.

	Peru	Brazilian	Argentine	West Indian	Mexican	Turkey	Cyprus	Mesopotamian	Sudan	East Africa	West Africa	South Africa	Australia	Chinese	Others	Total
Great Britain	37,757	18,465	16,813	6,238	5,958	931	51	2,161	35,459	21,555	8,778	1,761	191	-	325	156,443
Germany	4,015	26	2,758	1,968	1,443	965	-	32	–	72	4,200	507	51	253	-	16,290
France	1,540	1,390	2,540	240	—	1,120	-		5,710		12,400	—	—	—	13,010	37,950
Italy	110	—	173	—	-	4,775	—		—	103		—			4,005	9,166
Belgium	—	–	254	388	155	—	—	—		—	7,000			-	11,885	19,682
Switzerland	340	-		2	219	—	—	–	517	118	30		–	—	—	1,226
Poland	258	—	11	—	—	112	—	-	—				–	95	1,360	1,836
Holland	276	–	—		—	—	—		—	489	1,225	—		—	—	1,990
Austria	573	—	53		–	681	—	28	-	—	19	—	–	-		1,354
Czecho-Slovakia	80	–	—	–	—	1,258	—	-	—	17	36	—	—	—	1,050	2,441
China	—	—	-	—	—	—	—	-			—			674,719	132	674,851
Brazil	—	221,000	-	—	—	–	—		—	–	-	—	—	—	—	221,000
Mexico	—	—	—	—	81,000	—	—	-	—	—	—	—	—	—	-	81,000
Sweden	74	—	5	—	—	—	—	—	-	162	22	—	-	—	—	263
Denmark	759	—	—	—	—	—	—	-	—	—	—	—	-	-	—	759
Total Consumption	45,782	240,881	22,607	8,836	88,775	9,842	51	2,221	41,686	22,516	33,710	2,268	242	675,067	31,767	1 226,251

STOCKS.

	Peru	Brazilian	Argentine	West Indian	Mexican	Turkey	Cyprus	Mesopotamian	Sudan	East Africa	West Africa	South Africa	Australia	Chinese	Others	Total
Great Britain	9,133	2,321	1 045	4,312	1,131	30	2	518	17,168	4,243	894	147	4		51	40,999
Germany	801	158	357	955	916	7		—	—		2,072	972	91	353		6,682
France	1,380	1,010	1,890	150	-	970	—	—	2,790	—	5,850	—	-	—	17,220	31,260
Italy	-	—	290	—	—	1,880	-	—	—	57	—	—	—	—	2,308	4,535
Belgium	—	—	4	320	45	—	—	—	—	—	2,100	—		—	11,607	14,076
Switzerland	136	—	—	9	282	—	—	-	912	79	130	—	—	86	—	1,634
Poland	149	—	222	—	—	159	—	—	—	—	—	-	-	192	324	1,046
Holland	56	—	—	—	—	—	--	-	—	104	564	—	—	-	—	724
Austria	57	-	—	—	—	149	-	78	—	—	143	—	—	—	—	427
Czecho-Slovakia	—	—	—	—	—	341	—	—	—	—	42	—	—	—	261	644
China	—	—	—	—	—	—	—	—	—	—	—	-	—	168,050	444	168,494
Brazil	—	90,000	—	—	—	—	—	—	—	—	—	—	—	—	—	90,000
Mexico	—	—	—	—	36,000	—	—	-	—	—	—	—	—	—	—	36,000
Sweden	56	-	105	—	—	—	—	—	—	53	-	-	—	—	—	214
Denmark	150	—	--	—	—	—	—	—	—	—	-	—	-	—	—	150
Total Stocks	11,918	93,489	3,913	5,746	38,374	3,536	2	596	20,870	4 536	11,795	1,119	95	168,681	32,215	396,885

COTTON TRADE STATISTICS

GREAT BRITAIN.

COTTON YARN EXPORTED FROM THE UNITED KINGDOM.

PER BOARD OF TRADE RETURNS (IN LBS.)

	Grey unbleached		Bleached and dyed	
	Nine months ended 30th September			
	1929	1928	1929	1928
Russia	233,800	150,600	15,200	7,500
Sweden	1,043,400	1,315,900	33,000	36,400
Norway	2,180,800	2,334,800	65,500	90,400
Denmark	1,030,600	1,027,400	109,700	92,700
Poland (including Dantzig)	1,571,900	1,613,300	2,800	14,900
Germany	29,699,900	31,668,000	937,200	995,500
Netherlands	23,626,400	25,623,000	4,600	9,900
Belgium	4,584,900	4,510,900	48,200	22,400
France	4,188,000	2,945,700	23,000	13,000
Switzerland	6,038,400	6,879,800	4,200	2,400
Italy	1,030,500	678,600	8,000	8,400
Austria	1,083,400	931,300	2,700	4,900
Czecho-Slovakia	2,275,000	2,332,800	19,300	4,300
Serb-Croat-Slovene State	1,176,300	957,000	302,600	214,700
Bulgaria	761,600	1,379,400	464,500	628,700
Roumania	3,142,700	4,367,300	128,300	144,800
Turkey	392,400	406,800	81,400	62,700
China (including Hong Kong)	1,598,600	1,190,800	307,600	145,200
United States of America	1,639,600	1,162,400	243,600	163,300
Brazil	2,016,600	1,868,100	194,800	238,100
Argentine Republic	1,836,100	1,437,700	56,500	140,700
British India-				
Bombay via Karachi	60,500	68,200	307,200	425,300
„ other ports	4,812,200	4,236,800	1,452,500	1,681,600
Madras	4,673,200	3,097,400	2,405,000	1,543,200
Bengal, Assam, Bihar and Orissa	2,160,300	2,322,100	945,300	1,085,500
Burmah	60,500.	55,300	436,600	613,600
Straits Settlements and Malay States	51,400	28,200	129,800	115,500
Australia	1,751,200	1,170,400	2,570,800	1,914,900
Canada	1,089,600	1,188,200	192,000	148,300
Other countries	5,212,800	4,232,800	3,622,400	3,222,500
TOTALS :—				
Up to No. 40 count	44,636,200	46,470,500	12,273,300	11,142,000
Over No. 40 count and up to No. 80 count	48,980,100	46,638,400	2,084,300	2,098,400
Over No. 80 count and up to No. 120 count	15,191,400	16,362,600	577,700	419,900
Over No. 120 count	2,214,900	2,200,500	179,400	131,000
Total	111,022,600	111,681,000	15,114,700	13,791,300

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COTTON MANUFACTURES EXPORTED FROM THE UNITED KINGDOM

(In Square Yards.)

	Month ended 30th Sept.		Jan.–Sept. inclusive	
	1929	1928	1929	1928
Sweden	1,127,300	1,189,700	12,483,200	16,983,700
Norway	948,100	808,200	11,331,200	11,685,400
Denmark	2,015,000	1,953,200	19,106,500	17,311,300
Germany	2,114,200	3,422,200	33,856,000	41,935,300
Netherlands	4,336,100	3,061,000	51,325,600	52,749,300
Belgium	1,853,400	1,625,300	20,006,300	18,848,100
France	621,400	701,700	7,342,500	9,673,000
Switzerland	4,931,900	7,250,800	62,608,100	96,535,300
Portugal, Azores and Madeira	866,700	528,600	9,777,000	8,159,000
Italy	387,600	707,900	8,063,100	9,307,100
Greece	2,244,000	2,119,200	28,301,300	23,895,400
Roumania	611,500	868,000	8,336,200	12,119,900
Turkey	1,584,300	4,154,800	48,967,700	42,424,300
Syria	1,291,700	750,200	18,248,800	14,177,800
Egypt	8,220,500	11,332,700	113,841,500	94,893,400
Morocco	4,225,600	5,375,500	45,265,800	51,931,100
Foreign West Africa	5,815,300	7,392,100	40,377,900	42,982,400
Foreign East Africa	744,400	848,600	12,467,600	11,076,300
Iraq	2,264,100	4,652,700	30,279,700	37,339,000
Persia	417,300	1,194,500	12,120,000	14,828,500
Dutch East Indies	5,653,200	10,551,300	95,885,100	107,627,400
Philippine Islands and Guam	645,500	1,005,400	8,061,600	8,027,500
Siam	1,794,200	2,521,800	23,094,800	16,413,500
China	6,433,800	9,040,300	119,427,900	91,082,000
Japan	470,700	718,000	8,842,900	8,886,100
United States of America	2,016,000	2,925,200	24,956,800	30,769,100
Cuba	1,122,900	1,006,300	15,540,100	7,891,200
Mexico	1,341,300	1,115,500	11,004,800	11,610,600
Central America	1,496,600	1,202,900	12,472,700	10,645,800
Colombia	2,746,500	3,673,500	35,798,200	28,895,800
Venezuela	1,996,100	1,820,300	23,761,700	14,203,700
Ecuador	307,800	443,500	5,367,700	4,351,900
Peru	884,300	834,100	9,102,700	7,933,500
Chile	3,458,200	1,316,100	34,304,300	18,537,200
Brazil	1,163,900	4,127,400	34,528,100	37,933,000
Uruguay	1,006,800	1,282,100	13,749,100	14,912,300
Bolivia	225,100	63,100	2,729,600	2,171,800
Argentine Republic	10,783,000	11,336,600	108,828,000	117,649,300
British West Africa	10,884,300	9,833,500	84,400,300	94,054,000
British South Africa	6,168,000	5,464,000	54,690,900	51,981,700
British East Africa	1,135,000	1,300,900	14,514,700	14,034,800
British India–				
Bombay via Karachi	13,144,800	19,875,100	186,318,500	278,201,100
,, other ports	22,677,400	22,838,100	220,671,500	270,414,000
Madras	6,590,300	8,385,900	79,231,100	67,009,600
Bengal, Assam, Bihar and and Orissa	42,718,900	74,022,600	535,294,800	534,154,000
Burmah	4,723,100	3,154,600	54,608,500	40,237,600
Straits Settlements and Malay States	6,043,700	5,631,200	69,423,100	44,923,700
Ceylon	2,469,900	1,625,900	24,411,100	21,877,400
Hong Kong	1,121,400	2,209,700	33,536,200	23,521,500
Australia	12,217,800	10,935,400	128,811,400	111,244,400
New Zealand	2,471,000	2,216,200	25,830,300	23,603,600
Canada	2,304,200	2,880,000	29,959,800	32,822,800
British West India Islands and British Guiana	1,987,000	1,808,700	12,540,900	15,648,000
Other countries	10,713,300	11,126,600	112,545,000	118,568,700
Total	237,536,400	298,228,100	2,848,350,300	2,910,694,200

Cotton Manufactures Exported from the United Kingdom—*Continued*

	Month ended 30th Sept.		Jan.–Sept. inclusive	
	1929	1928	1929	1928
Total of grey or unbleached	58,112,500	96,399,800	777,380,800	814,080,200
Piece goods white—bleached	85,704,500	98,179,300	1,028,721,100	1,014,970,300
Total of piece goods—printed	35,860,500	39,442,500	370,868,400	418,303,000
Total of piece goods dyed in the piece, also manufactured or part of dyed yarn	57,858,900	64,206,500	671,380,000	663,340,700
Total of piece goods of all kinds	237,536,400	298,228,100	2,848,350,300	2,910,694,200

U.S.A. Exports of Cotton and Cotton Goods during First Eight Months of 1929.

Attention was drawn in our last year's report on the Mill Visits of U.S.A. that the exports from that Continent would more and more compete in the world's markets, particularly at times of depression in the home market of U.S.A.—At the time of publication of our report several Lancashire merchants and manufacturers expressed a doubt as to the correctness of our prophecy, but the following figures of the Department of Commerce, Washington, D.C., show that the volume has increased from 344,828,841 square yards in the first eight months of 1928 to 406,381,053 in the corresponding period of 1929, and the value rose from $51,104,062 to $57,454,460, a gain of 18.4 per cent. in quantity and 12.4 per cent. in value.

A study of the following tables will repay. Unbleached sheetings comprise 14.3 per cent., voiles 10.2 per cent., bleached sheetings 8.5 per cent., and prints 12.51 per cent. These are all produced on automatic looms.

ARNO S. PEARSE.

U.S.A. EXPORTS.

Articles and Countries to which exported	Unit of Quantity	Eight months ending August			
		1928		1929	
		Quantity	Value	Quantity	Value
			$		$
COTTON UNMANUFACTURED ..	bale	4,128,104	437,251,412	3,601,465	368,067,457
	lb.	2,157,366,976		1,886,624,038	
Lint cotton	bale	4,010,917	432,597,012	3,481,177	363,528,465
	lb.	2,089,660,789		1,815,719,985	
Long staple (1⅛ in. or over):					
American Egyptian (Pima)	bale	—	76,394,720	2,137	450,087
	lb.			1,194,122	
Other long staple (including Sea Island) . .	bale	683,042		392,673	41,851,786
	lb.	356,427,785		204,130,205	
Short staple (under 1⅛ in.) ..	bale	3,327,875	356,202,322	3,086,667	321,226,592
	lb.	1,733,233,004		1,610,395,658	
Belgium	bale	104,651	11,556,641	102,328	11,059,896
	lb.	53,236,820		54,425,199	
Finland	bale	4,917	598,754	3,271	344,518
	lb.	2,713,583		1,769,657	
France	bale	348,063	39,170,112	309,930	33,631,701
	lb.	183,268,654		164,548,825	
Germany	bale	819,081	88,934,342	603,585	63,415,578
	lb.	427,885,784		317,486,861	
Italy	bale	418,191	45,236,859	391,527	41,699,357
	lb.	218,333,191		206,575,325	
Netherlands	bale	81,854	9,272,638	73,034	7,974,375
	lb.	43,591,612		39,335,750	
Norway	bale	2,660	284,120	2,352	244,630
	lb.	1,389,251		1,250,304	
Portugal	bale	22,233	2,402,128	26,478	2,871,408
	lb.	11,079,351		14,449,968	
Soviet Russia in Europe ..	bale	365,756	37,896,377	225,160	22,859,787
	lb.	191,081,752		116,832,487	
Spain	bale	161,140	17,926,135	131,312	14,231,425
	lb.	86,789,197		71,164,694	
Sweden	bale	26,880	2,876,900	23,904	2,517,186
	lb.	14,077,156		12,769,691	
Switzerland	bale	950	111,541	1,650	188,883
	lb.	495,333		867,114	
United Kingdom	bale	934,028	98,841,875	759,889	79,849,092
	lb.	478,736,824		392,002,816	
Other Europe	bale	16,667	1,908,417	16,474	1,804,455
	lb.	8,885,649		8,808,275	
Canada	bale	127,020	13,525,120	147,770	14,803,785
	lb.	65,428,378		75,684,588	
British India	bale	62,805	6,584,466	9,650	1,017,771
	lb.	33,165,093		5,154,094	
China, Hong Kong, and Kwantung	bale	67,723	7,264,734	131,349	13,262,071
	lb.	35,557,599		68,167,530	
Japan	bale	441,894	47,821,416	505,741	50,116,066
	lb.	231,746,393		255,933,452	
Other countries	bale	2,595	284,458	16,073	1,655,872
	lb.	1,299,158		8,403,346	
Linters	bale	117,187	4,654,370	119,088	4,538,992
	lb.	67,706,187		70,004,053	
COTTON SEMI-MANUFACTURES	lb.	75,775,041	16,312,418	74,077,939	16,316,202
Cotton mill waste	lb.	45,349,731	5,056,951	40,666,530	4,636,908
Cotton rags, except paper stock	lb.	12,666,007	977,889	14,499,686	1,053,688
Cotton batting, carded cotton and roving	lb.	219,888	40,355	322,906	62,702
Cotton yarn—					
Carded yarn, not combed ..	lb.	9,009,712	3,358,821	9,405,174	3,175,501
Europe	lb.	190,087	72,980	13,506	6,572
Canada	lb.	427,891	189,490	402,064	182,120
Salvador	lb.	146,133	53,190	216,741	75,697
Newfoundland & Labrador	lb.	68,041	16,046	515,334	143,620
Argentina	lb.	5,855,919	2,206,612	5,855,380	1,913,794
Chile	lb.	627,098	210,300	912,188	317,989
Colombia	lb.	300,012	103,981	516,513	164,779
Uruguay	lb.	813,402	280,281	333,283	125,169
Other South America ..	lb.	107,278	48,664	71,476	24,748
Other countries	lb.	473,856	177,277	568,689	221,013

U.S.A. EXPORTS—*Continued.*

Articles and Countries to which exported	Unit of Quantity	Eight months ending August			
		1928		1929	
		Quantity	Value	Quantity	Value
			$		$
Combed yarn..	lb.	8,509,703	6,878,427	9,183,553	7,387,343
Mercerized ..	”	6,831,594	5,987,113	8,134,330	6,830,814
Not mercerized	”	1,678,109	891,314	1,049,223	556,499
United Kingdom ..	”	900,467	798,930	765,113	756,010
Canada	”	1,467,922	1,274,520	1,762,317	1,520,028
Mexico	”	326,388	297,465	357,138	295,724
Argentina ..	”	2,861,386	2,312,426	2,605,961	1,969,739
Brazil	”	893,605	828,522	801,001	696,263
Chile	”	250,520	188,565	405,009	317,252
Uruguay	”	199,164	165,758	244,623	195,444
Other South America	”	498,977	195,642	310,604	143,150
Australia ..	”	709,475	574,697	1,060,386	912,184
Other countries	”	392,799	241,884	871,401	587,549
COTTON MANUFACTURES		—	71,758,879	-	79,255,716
Cotton thread and cordage:					
Sewing thread	”	691,135	680,380	729,018	740,491
Crochet, darning and embroidery cotton	”	97,907	114,394	66,091	77,063
Twine	”	2,584,215	1,015,178	3,126,961	1,234,348
Cotton cloth, duck, and tire fabric..	sq. yd.	344,828,841	51,104,962	406,381,053	57,154,460
Tire fabric:					
Cord	”	3,491,804	1,545,552	3,888,413	1,773,350
Other	”	1,240,571	376,272	791,456	260,399
Cotton duck ..	”	9,270,857	3,162,390	10,664,165	3,635,775
Heavy filter, paper dryer, hose and belting	”	299,531	225,624	386,190	251,801
Unbleached (gray):					
Ounce	”	3,468,867	991,813	4,197,973	1,179,127
Numbered ..	”	3,226,928	1,240,965	2,901,842	1,188,779
Bleached	”	1,360,741	396,440	1,662,634	519,836
Coloured	”	914,790	307,548	1,455,516	496,232
Cotton cloth, unbleached (gray)	”	75,280,212	7,157,884	95,667,608	8,783,980
Drills and twills	”	8,800,003	1,121,370	8,324,957	1,068,678
Sheetings, 40 in. and under	”	44,348,172	3,956,807	58,401,584	5,147,555
Greece	”	386,573	48,085	733,353	89,907
Other Europe	”	462,279	57,723	1,233,744	130,030
Canada	”	3,003,414	293,597	6,468,553	550,117
Salvador	”	3,079,491	258,055	4,439,409	384,892
Other Central America	”	5,354,443	482,188	7,538,841	676,140
Mexico	”	69,504	10,679	47,041	5,898
Jamaica	”	1,624,775	125,150	2,812,494	236,546
Cuba	”	3,116,807	269,664	3,997,245	341,321
Dominican Republic	”	994,556	95,159	1,177,729	115,622
Haiti, Republic of	”	3,581,341	312,783	1,833,918	106,043
Other West Indies and Bermudas	”	271,452	26,500	307,567	27,043
Argentina ..	”	1,311,047	105,263	2,072,781	168,449
Bolivia	”	1,787,115	184,326	1,457,925	137,649
Chile	”	2,293,410	244,988	2,689,881	262,009
Colombia ..	”	3,661,062	334,380	3,720,313	307,943
Peru	”	357,899	35,044	313,893	34,581
Venezuela ..	”	226,752	23,203	209,247	20,975
Other South America	”	1,828,084	160,067	2,382,958	194,161
Aden	”	2,137,500	180,712	2,780,153	210,402
British India	”	150,985	17,715	1,034,764	116,771
Philippine Islands	”	4,160,170	359,013	4,945,450	435,172
Oceania	”	409,099	41,279	920,447	80,558
British Africa	”	2,937,111	211,018	3,818,633	306,001
Other countries	”	1,143,303	130,198	1,956,245	209,825
Sheetings over 40 in.	”	944,587	105,513	1,130,351	130,963
Osnaburgs ..	”	11,467,069	1,165,458	15,088,084	1,609,158
All other unbleached	”	9,729,381	808,696	12,722,632	827,626

U.S.A. EXPORTS—*Continued.*

Articles and Countries to which exported	Unit of Quantity	Eight months ending August			
		1928		1929	
		Quantity	Value	Quantity	Value
			$		$
Cotton cloth, bleached	sq. yd.	60,412,946	6,953,344	67,460,951	7,907,385
Drills and twills	„	—	—	3,903,892	485,561
Pyjama checks	„	—	—	6,910,120	705,627
Sheetings 40 in. wide and under ..	„	—	—	25,318,528	2,901,687
Europe	„	—	—	296,101	42,608
Canada	„	—	—	1,487,125	136,841
Central America	„	—		1,574,660	181,091
Mexico	„	—	—	408,024	53,517
Cuba	„	—	—	4,377,610	467,425
Dominican Republic	„	—	—	848,312	92,017
Haiti, Republic of	„	—	—	248,265	24,472
Other West Indies and Bermudas	„	—	-	393,886	33,519
Argentina	„	—	—	771,982	80,411
Chile	„	—	—	218,183	24,686
Colombia	„	—	—	382,781	55,476
Peru	„	-	—	78,165	11,021
Other South America	„	—	—	948,076	105,898
Philippine Islands	„	—	—	12,097,927	1,442,899
Other countries	„	—	—	1,287,181	149,806
Sheetings over 40 in. wide	„	-	—	10,751,730	1,426,085
All other bleached	„	-	—	20,576,681	2,394,425
Cotton cloth, coloured	„	195,123,451	31,909,560	227,908,470	35,093,571
Voiles	„	28,462,497	4,523,944	41,578,303	5,996,272
Percales and prints, 32 in. and narrower	„	21,372,243	2,303,883	22,805,521	2,376,162
Percales & prints, over 32 in. wide	„	7,591,676	991,991	8,519,625	1,175,705
Flannels and flannelettes	„	2,592,302	411,920	3,040,565	470,541
Khaki and fustians	„	2,636,604	546,061	3,273,795	648,307
Denims	„	8,039,689	1,591,084	12,066,082	2,216,131
Suitings (drills, etc.)	„	16,952,682	2,927,749	22,188,256	3,576,095
Ginghams	„	7,582,243	894,448	10,222,272	1,075,978
Chambrays	„	7,111,165	804,070	10,291,715	1,109,293
All other printed fabrics	„	26,596,540	4,787,138	—	—
7½ yds. per lb. and lighter ..	„	—	—	21,074,407	3,448,197
Heavier than 7½ yds. per lb. ..	„	—	—	13,604,724	2,488,910
All other piece-dyed fabrics ..	„	40,878,026	6,763,813	—	—
5 yds. per lb. and lighter ..	„	—	—	18,769,578	2,750,244
Heavier than 5 yds. per lb. ..	„	—	—	13,216,771	1,963,784
All other yarn-dyed fabrics ..	„	14,848,219	2,387,747	13,740,779	2,087,161
Cotton and rayon mixtures (chief value cotton)	„	10,450,565	2,975,712	13,516,077	3,710,791
Other cotton fabrics:					
Blankets	lb.	826,021	495,540	1,011,253	563,988
Damasks	sq. yd.	506,813	134,378	600,272	183,320
Pile fabrics, plushes, velveteens, and corduroys	„	459,800	369,684	327,760	269,559
Tapestries and other upholstery goods	„	321,669	165,354	195,619	183,076
Other fabrics sold by the lb. ..	lb.	5,779,506	2,107,757	6,516,480	2,481,166
Cotton wearing apparel	—	—	9,955,724	—	10,367,050
Knit goods:					
Gloves	doz. prs.	61,759	107,578	91,332	152,152
Hosiery	„	2,685,857	4,711,656	2,768,583	4,714,396
Women's	„	1,427,132	2,633,811	1,401,596	2,486,404
Children's	„	485,618	779,960	554,673	856,788
Men's socks	„	773,107	1,297,885	812,314	1,371,204
United Kingdom	„	164,077	263,757	274,459	438,613
Other Europe	„	299,386	697,513	269,543	589,313
Canada	„	424,816	631,343	513,019	775,088
Central America	„	212,574	383,274	215,815	392,231
Mexico	„	56,887	130,580	26,368	71,100

U.S.A. EXPORTS—*Continued.*

Articles and Countries to which exported	Unit of Quantity	Eight months ending August			
		1928		1929	
		Quantity	Value	Quantity	Value
			$		$
British West Indies and Bermudas	doz. prs	92,364	135,138	86,388	136,236
Cuba	"	497,604	757,883	423,301	610,831
Dominican Republic	"	61,131	92,902	89,561	136,468
Argentina	"	30,082	75,313	13,840	41,821
Chile	"	37 099	71,168	33,142	58,507
Colombia	"	198,679	373,872	146,470	278,241
Peru	"	91,373	130,837	109,903	153,961
Uruguay	"	59,140	70,522	31,158	52,685
Venezuela	"	90,655	157,819	84 305	142,565
Other South America	"	57,150	90,308	101,818	154,467
British India	"	27,571	70,735	31,437	76,112
Philippine Islands	"	71,611	135,006	76,598	145,253
Australia	"	10,445	27,654	5,357	15,861
British South Africa	"	57,724	109,508	68,650	122,147
Other countries	"	165,480	306,524	167,442	322,646
Underwear	doz.	407,050	1,504.901	415,193	1,140,627
Sweaters, shawls, and other knit outer wear	No.	250,902	209,496	245,658	201,837
Other wearing apparel:					
Collars and cuffs	doz.	200,727	294,703	181,826	243,272
Cotton overalls, breeches & pants	"	21,741	280,312	33,926	415,587
Underwear, not knit	"	87,600	437,686	91,359	424,940
Shirts	"	122,745	1,163,095	153,347	1,353,756
Dresses, skirts, and waists	No	395,083	452,081	494,907	482,431
Other cotton clothing		-	794,216		938,052
Other cotton manufactures:					
Handkerchiefs	doz.	137,687	92,872	158,717	105,791
Laces, embroideries, and lace window curtains	yd.	3,537,784	149,317	3,347,992	160,196
Woven belting for machinery	lb.	320,473	184,029	322,802	181,842
Cotton bags	"	4,205,817	975,953	3,927,987	815,177
Quilts, comforts, counterpanes, and bedspreads	No.	132,334	184,732	120,104	175,595
Bed sheets, pillow, bolster, and mattress cases	doz.	18,491	131,681	24,008	180,953
Towels, bath mats & wash cloths	"	510,067	687.191	647,455	920,760
Other cotton manufactures	—	-	3,209,753	-	3,160,965

U.S.A. IMPORTS OF RAW COTTON.

	Twelve months ending July	
	1928	1929
	lbs.	lbs.
Honduras	—	7,517
Mexico	11,421,751	26,004,317
British West Indies	27,800	1,221
Cuba	11,289	—
Haiti	—	2,370
Brazil	205,280	—
Ecuador	4,565	25,000
Peru	11,659,319	8,676,280
British India	12,831,528	27,211,824
China	31,444,065	17,429,076
Netherland East Indies	394,752	1,014,729
Japan	40	—
British East Africa	—	313,303
British West Africa	93,555	56,685
Egypt	100,927,800	148,143,226
Algeria and Tunisia	91,274	16,332

U.S.A. EXPORTS OF RAW COTTON

DURING THE COTTON YEAR BEGINNING AUGUST 1.

Twelve months ending July

	Bales	lbs	Dollars	Bales	lbs.	Dollars
Austria .	1,828	976,567	222,818	1,300	703,787	156,816
Belgium .	201,603	104,267,236	22,427,874	202,113	107,428,670	21,825,200
Czecho-Slovakia	1,550	822,033	178,492	2,570	1,378,580	291,558
Denmark ..	28,508	15,092,968	3,292,806	17,078	9,218,287	1,871,024
Esthonia	3,750	2,003,728	458,898	3,600	1,948,395	409,549
Finland .	11,467	6,273,920	1,364,835	13,315	7,214,544	1,424,506
France	865,218	456,449,732	98,676,037	774,574	410,503,924	84,651,301
Germany	1,987,657	1,034,680,927	217,883,082	1,796,798	947,037,638	190,042,835
Greece	6,682	3,543,690	742,629	3,201	1,714,999	350,128
Hungary	500	260,057	55,229	250	131,308	26,580
Italy	686,801	357,654.461	74,001,623	716,802	377,328,468	75,946,032
Latvia	500	275,078	64,195	400	218,875	40,000
Netherlands	140,216	74,400,552	15,893,167	152,744	82,077,672	16,847,913
Norway	4,670	2,447,088	492,973	3,852	2,058,341	403,453
Poland and Danzig	—	—	—	109	52,626	10,209
Portugal	32,108	17,243,418	3,646,950	45,308	24,751,288	4,937,783
Soviet Russia in Europe	424,304	221,504,483	42,381,512	317,687	164,193,789	32,729,018
Spain .	304,646	162,710,295	33.891,971	273,210	147,266,605	29,528,755
Sweden	54,278	28,572,241	5,810,467	51,101	27,276,983	5,371,342
Switzerland	1,850	978,112	215,744	4,750	2,523,094	527,688
United Kingdom	1,411,406	725,135,640	150,958,470	1,830,846	947,560,516	193,191,263
Canada .	223,384	113,889,596	23,436,864	254,377	130,975,641	25,666,317
Guatemala	1,100	542,721	105,388	700	363,418	71,864
Honduras .	100	51,374	13,087	—	—	—
Mexico	—			1,466	764,062	131,111
Newfoundland & Labrador		—		217	106,480	19,911
Cuba . .	1	500	127	—	—	—
French West Indies		--	-	1	459	55
Bolivia	-	—	-	500	257,053	58,302
Chile . . .	65	34,677	6,908	273	139,648	32,176
Colombia .. .	21	10,048	1,507	1,473	736,890	145,779
Ecuador .. .	1,283	650,764	149,777	2,706	1,395,174	279,831
Peru . . .	--	—	—	74	37,800	8,600
Uruguay . ..	35	16,986	4,330	27	14,756	2,945
Venezuela .. .	—	—	—	810	415,055	79,586
British India . .	67,397	35,441,993	6,994,325	10,425	5,559,699	1,095,769
China . .	118,331	61,559,184	12,567,510	236,498	122,987,872	24,022,122
Hong Kong . .	1,701	914,367	178,945	3,550	1,906,621	394,534
Japan . . .	959,304	500,208,178	103,968,210	1,309,183	676,064,650	133,803,802
Soviet Russia in Asia .	-	—	—	9,700	5,065,264	1,013,053
Syria . .	50	24,493	5,143	—	—	—
Australia . . .	95	40,586	12,373	—	—	—

LANCASHIRE COTTON TRADE—SPINNERS' MARGINS.

The following table gives the average approximate margins ruling November 2, together with previous years' quotations, also 1913, for comparison :—

	1929	1928	1927	1926	1913
American—	d.	d.	d.	d.	d.
32's cop twist (per lb.) ..	14·62	15·75	17·37	13·50	10·93
October futures (per lb) ..	9·53	10·04	11·20	6·68	7·21½
(Noon values)					
	5·09	5·71	6·17	6·82	3·71½
Previous week	5·09	5·84	6·46	6·85	3·60
Egyptian—					
60's cop twist (per lb.) ..	25·50	28·50	30·25	26·50	17·98
October futures (per lb.) ..	14·41	17·30	18·16	13·43	10·10
(Noon values)					
	11·09	11·20	12·09	13·07	7·88
Previous week	10·95	11·15	12·03	14·60	8·05

NOTE.—In the above figures no account is taken of the "points on" a spinner pays for his cotton.

(*Cotton, Manchester.*)

EGYPTIAN COTTON CONSUMED IN U.S.A.

(Equivalent 500-lbs. bales)

Month		1921-22	1922-23	1923-24	1924-25	1925-26	1926-27	1927-28	1928-29 (*)	1929 30
August	.	20,263	16,707	17,819	11,268	17,865	17,162	22,443	18,594	20,285
September		15,896	13,209	15,740	13,527	17,939	22,884	19,639	16,138	—
October	..	10,891	15,476	20,846	13,979	17,520	20,812	19,345	19,592	—
November		22,291	20,439	19,880	19,129	12,550	16,393	20,507	17,632	—
December	..	20,779	21,344	18,085	16,491	16,002	17,015	18,584	17,849	--
January	..	20,777	25,947	23,443	18,662	18,343	17,365	20,064	22,176	—
February	..	19,908	25,923	23,040	17,698	19,205	17,250	20,435	19,479	—
March	.	20,390	27,410	20,998	17,965	21,770	21,773	17,018	20,490	—
April	.	16,748	27,145	21,168	16,532	18,197	19,527	16,448	20,149	—
May	..	17,253	29,165	15,846	16,893	17,043	22,013	14,923	20,470	—
June	..	17,205	22,498	13,894	17,824	15,092	26,069	13,949	18,067	—
July	..	15,929	17,070	12,892	17,865	14,591	21,354	13,451	20,343	—
Total	..	218,330	262,333	223,651	197,833	206,126	239,617	216,806	230,979	—

*Subject to slight revisions.

RAYON.

TABLE I—ESTIMATES OF WORLD PRODUCTION AND CONSUMPTION OF RAYON—1929

(In thousands of lbs.)

Country	Production	Imports	Exports	Consumption*
Austria	4,000	2,000	3,000	3,000
Belgium	16,000	900	6,000	10,900
Czecho-Slovakia	4,000	4,500	1,500	7,000
France	38,000	1,250	12,000	28,000
Germany	44,000	17,000	19,000	42,000
Britain	48,500	2,250	8,000	42,750
Holland	20,000	2,000	18,000	4,000
Hungary	700	1,400	600	1,500
Italy	50,000	1,000	32,000	21,000
Poland	5,500	1,500	2,000	6,000
Spain	3,000	4,500	-	7,500
Sweden	350	1,750		2,100
Switzerland	12,000	3,200	8,000	7,200
Others	1,000	—	-	4,500
Total Europe	247,050	--		187,450
China	—	13,000		13,000
India	—	7,500		7,500
Japan	14,000	—		14,000
Total Asia	14,000	—		34,500
Canada	3,750	1,500	—	5,250
United States	131,325	17,250	--	148,575
Others	—	1,200	—	1,200
Total N. America	134,750	—	—	156,950
Total S. America	1,000	6,000	—	7,000
Australasia	—	3,000	—	3,000
Grand totals	396,125	—	—	386,975

* Including estimate of 1928 excess production absorbed in 1929.

TABLE II—WORLD PRODUCTION OF RAYON

(In thousands of lbs.)

Process	1928	1928
Viscose	293,320	326,625
Acetate	25,100	35,750
Cupra	13,950	18,500
Collodion	15,030	15,950
Total	347,400	397,125

TABLE III—ESTIMATED PRODUCTION OF RAYON BY PROCESSES IN 1929 IN VARIOUS COUNTRIES

(In thousands of lbs.)

Country	Total Production	Viscose	Acetate	Cupra	Nitro-Cellulose
Australia	4,000	4,000	—	—	—
Belgium	16,000	9,000	4,000	500	2,500
Czecho-Slovakia	4,000	4,000	—	—	—
France	38,000	31,000	5,500	1,500	—
Germany	44,000	30,000	1,000	13,000	—
Britain	48,500	34,000	14,000	500	—
Holland	20,000	19,500	500	—	—
Hungary	700	—	—	—	700
Italy	50,000	47,000	2,000	1,000	—
Poland	5,500	3,750	—	—	1,750
Spain	3,000	3,000	—	—	—
Sweden	350	350	—	—	—
Switzerland	12,000	12,000	—	—	—
Japan	14,000	14,000	—	—	—
Canada	3,750	2,500	1,250	—	—
United States	131,325	110,525	7,500	2,300	11,000
Brazil	1,000	1,000	—	—	—
Others	1,000	1,000	—	—	—
Totals	397,125	326,625	35,750	18,800	15,950

TABLE IV—WORLD PRODUCTION OF RAYON BY COUNTRIES

Country	1926 Thous. lbs.	1927 Thous. lbs.	1928 Thous. lbs.	1929† Thous. lbs.
United States	62,575	75,050	98,650	131,325
Great Britain	25,500	38,803	52,000	48,500
Italy	35,000	36,000	45,000	50,000
Germany	26,000	31,000	41,000	44,000
France	17,500	21,000	30,000	38,000
Holland	13,500	16,500	16,500	20,000
Belgium	13,100	13,500	15,000	16,000
Switzerland	8,000	10,340	12,000	12,000
Japan	5,500	8,000	12,000	14,000
Poland	2,000	4,000	7,500	5,500
Austria	3,500	3,500	4,500	4,000
Czecho-Slovakia	2,800	3,500	3,500	4,000
Spain	300	1,000	2,500	3,000
Hungary	*	*	1,000	700
Canada	2,250	2,600	3,750	3,750
Brazil	*	*	1,000	1,000
All others	1,555	2,075	1,500	1,350
Totals	219,080	266,868	347,400	396,125

* Included in all others. † Estimated.

(*Textile World.*)

U.S.A. CENSUS OF MANUFACTURES, 1927.

COTTON MANUFACTURES GROUP—SUMMARY FOR THE UNITED STATES 1919 TO 1927

Figures for 1921 and 1919 not strictly comparable with those for subsequent years. Data for establishments with products under $5,000 in value included for 1919 but not for the subsequent years.

Year or Period	Number of establishments	Wage earners (average for the year)	Wages	Contract work	Cost of materials, supplies, fuel and power	Value of products	Value added by manufacture*	Horse power†
			$	$	$	$	$	
1927	1 610	489 036	403 827 723	9 083 880	915 206 300	1 6[illegible] 518 7[illegible]	744 812 4[illegible]6	2 3[illegible]9 [illegible]44
1925	1 6[illegible]8	468 352	377 050 16[illegible]	8 035 256	1 132 330 36[illegible]	1 819 886 390	687 556 0[illegible]1	2 279 6[illegible]0
1923	1 642	495 1[illegible]7	420 644 486	12 041 536	1 200 617 929	2 010 141 117	809 523 [illegible]8	2 1[illegible]4 770
1921	1 527	42[illegible] 817	340 749 [illegible]98	4 727 20[illegible]	731 584 919	1 380 263 117	[illegible]8 678 1[illegible]	
1919	1 4[illegible]	446 8[illegible]	368 72[illegible] 71[illegible]	4 162 821	1 314 901 542	2 195 [illegible]65 881	880 6[illegible]4	[illegible]
				Per Cent of Increase or Decrease ( )				
1925-27	−1 7	4 4	7 1	13 1	19 2	8 8	[illegible]	
1923-25	[illegible]	5 4	10 4	−33 3	5 7	9 5	15 1	[illegible]
1923-27	1 9	−1 2	4 0	24 6	23 8	17 4	8 1	[illegible]
1919-27	7 [illegible]	9 4	[illegible]	118 2	30 4	24 4	15 5	[illegible]9 0

* Value of products less cost of materials, supplies, fuel, and power.
† Not called for on schedule.

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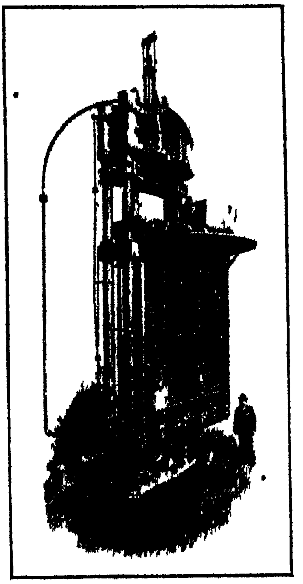

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Reviews on Current Cotton Literature.

DIE UNABHANGIGKEITSBESTREBUNGEN ENGLANDS, FRANKREICHS UND DEUTSCHLANDS IN IHRER BAUMWOLLVERSORGUNG," by Dr Robert Ed Buhler, published by Girsberger & Co, Zurich. In this book of 220 pages the author gives a comprehensive record of the activities undertaken by England, France, Germany, Italy and Portugal in their efforts to become independent of the cotton supplies of U S A. It is an excellent book of reference, as it describes the earliest stages of the movement right to the present day. It would have been an advantage if an alphabetical index had been added. A description of all the limited companies devoted to cotton growing in the world, which have originated in consequence of the efforts described, would have formed a useful additional chapter.

THE NEW COMPANY LAW," as it affects private and public companies in Great Britain, by Herbert W Jordan, published at 4s by Jordan & Sons Ltd, London.

"COTON ET COTON COTONNIERE," Vol IV, fascicule 1, by F Heim de Balsac, Professor of Agriculture, 34, rue Hamelin, Paris XVI. This periodical contains a description of the Havre cotton market by M H du Pasquier, of the Technical Laboratory at Bombay, and extracts and analyses of recent publications.

"FINANCIAL, INDUSTRIAL AND COMMERCIAL CONDITIONS IN CANADA," by F W Field, H M Senior Trade Commissioner in Canada, published by H M Stationery Office at 3s. This is one of the reports of the Department of Overseas Trade. We extract from it the following relating to cotton.

"In 1926 cotton yarn and cloth was manufactured to the value of $76,274,000. In addition the following products were made in the cotton mills: Cotton thread, $4,538,000, cotton batting and wadding, $2,404,000, and other cotton goods, $3,914,000. The yardage of bleached or white cotton fabrics in 1926 was 39,453,000, of unbleached or grey cotton fabrics, 106,996,000, and printed, dyed and coloured cotton fabrics, 126,692,000. Over 22,000,000 lbs of grey yarns were produced.

Cotton manufacturers operated at between 60 to 80 per cent of capacity during the first eight months of 1928 on a close margin of profit. During the last four months the demand for their products improved sufficiently to justify full or nearly full operation, but it is stated there was no appreciable improvement in profit margin. Some of the cotton companies have complained of the competition of imported lines, particularly from Manchester, quoted at low prices.

The Canadian cotton mills, as a rule, do their own dyeing, printing and finishing.

Importations of cotton goods from the United Kingdom are becoming more difficult. Increased competition from the United States is experienced, particularly in fancy cloths, shirtings and dress goods, and in the past spring season in printed fancies. Our trade is likely to be obtained principally in the fine counts in future."

"Journal of Royal Statistical Society, London," XCII, Part III, 1929, contains a detailed article on the Movement of Wages in Germany, 1920–1928, by Professor C. Bresciani-Turroni.

"Ginning Percentage and Lint Index of Cotton," by A. James Turner, M.A., B.Sc., published by Indian Central Cotton Committee, Bombay, at 1 rupee.

"Vickers Ltd. and its Interests" is a brochure published by Vickers Ltd., Broadway, Westminster, London, S.W.1., setting out the world-wide ramifications of this huge firm. To the cotton manufacturers the subsidiary firm, Vickers (Crayford) Ltd., is of interest, as it turns out a loom, called the "Vickers-Stafford," which is an automatic shuttle-change loom.

"1928 Report, Bombay Mill Owners' Association." In some 600 foolscap pages very valuable information on the Indian cotton industry is given. The effect of Japanese and Chinese competition is shown. A number of statistical tables makes this report very valuable for reference.

"Unemployment: Some International Aspects, 1920 to 1928. Report by the International Labour Office, Geneva," published at 5s., $1.25, by P. S. King & Son Ltd., London.

The section of the book dealing with unemployment in the textile industries, and comprising some 70 pages, is of particular interest to the student of the cotton industry. Each of the *world's* countries where cotton spinning and weaving is carried on is being dealt with separately. The book is a valuable contribution towards the cotton literature, as it is a real mine of information; it ought to be frequently used as a reference book by all engaged in the higher cotton economics.—The aim of the book was to call attention to certain facts of general interest rather than offer any complete explanation of them; to state the problems rather than to discuss how to solve them.

"Yearbook of Agriculture, 1928," issued by the Department of Agriculture, Washington, D.C. This volume of 1,435 pages shows the magnitude and diversity of the work undertaken by this huge Government Department. All the aspects of farming, from the first steps in the preparation of the soil to the last steps in placing finished products in the consumer's hands are discussed by specialists. Cotton has been dealt with exhaustively in many parts of the book. No other country in the world has anything like as efficient a Department of Agriculture as the U.S.A., nor is money as freely spent on such really paying investments as a thorough Department of Agriculture.

"Davison's Textile Blue Book, 1929." The Davison Publishing Co., 30, Union Square, New York, published the sixty-fourth annual edition of their Directory containing complete lists of the cotton manufacturers of the United States, Canada and Mexico, as well as the bleachers, dyers, finishers, silk mills, underwear manufacturers, etc. This is a very comprehensive issue, the perfection of which could only have been obtained after many years of arduous work.

"HOCHVERZUG IN DER BAUMWOLLE - VERARBEITUNG VOM ROHSTOFF BIS ZUM VEREDELTEM GEWEBE (HIGH DRAFT IN COTTON SPINNING, FROM THE RAW MATERIAL TO THE FINISHED CLOTH)." By Dr. ing. Walter Lindenmeyer; published at 10s. by R. Oldenbourg, Munich, 6, Glückstrasse. The author, a practical cotton spinner with scientific training, examines the developments which have taken place, the yarns produced, their behaviour in winding, warping, weaving and in the finishing processes. All the experiments made were undertaken on factory scale. This book, written in German but printed in Latin characters, is worthy of translation into other languages, as it is a most carefully written book, free from bias for any special high-draft system. A very large number of tests have been made, and their results are given.

"BULLETIN OF THE IMPERIAL INSTITUTE," Vol. XXVII, No. 3, October, contains an article on cotton growing in Tanganyika and describes experiments carried out relating to times of sowing, spacing of plants, cotton varieties and ratooning.

"YEARBOOK OF THE NATIONAL ASSOCIATION OF COTTON MANUFACTURERS, 1929." This is the twelfth edition of an extremely useful compilation of the cotton statistical matter of the world, and is particularly valuable as a reference book to cotton-mill men. The technical section contains a mass of tabulations giving information on standard cotton-mill practices in U.S.A., such as power requirements, card settings, production of machines, humidity, etc.

"TRANSACTIONS OF THE NATIONAL ASSOCIATION OF COTTON MANUFACTURERS" is a report of two conferences held by the Association in 1928. This publication contains the papers read at these two conferences and the discussions which followed on each paper. Among the subjects dealt with and reprinted in this volume are:—

Opening and cleaning of cotton, moisture in cotton and invisible waste, moisture content in cotton, electricity and the Textile Institute, new uses for cotton, slashing of cotton warps, etc.

"MANCHESTER AT WORK," published by the Manchester Civic Week Committee at 1s., contains an interesting account by the late W. H. Barker, M.A., which discusses the various reasons which caused the location of the cotton industry round Manchester. Professor G. W. Daniels gives a retrospect of the city's origin and growth. Mr. H. G. Hughes, director of the Cotton Trade Statistical Bureau, discusses at length the textile export trade and the markets of Manchester. Mr. Hughes gives some valuable comparative tables relating to cotton exports and analyses the more important markets. Mr. John Jewkes subscribes an article on the industries of Manchester, chief of which, of course, is the cotton industry; some very useful tables relative to the Lancashire cotton industry are contained in this last article.

"ANNUAL COTTON HANDBOOK, 1929," published by Comtelburo Ltd., 11, Tokenhouse Yard, London. This is the fifty-ninth

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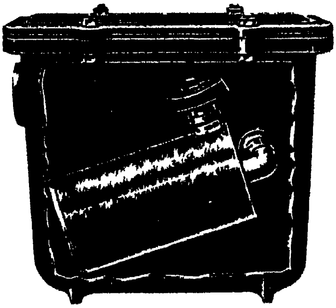

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annual edition of this very useful cotton reference book. To give a list of the statistical tables contained in this handy pocket book would be impossible in the space available to us here, but it will suffice to say that practically every available cotton statistical table published by the cotton trade of the world is contained in this handy volume for easy reference. (5s. 3d post free.)

"SKINNER'S COTTON TRADE DIRECTORY OF THE WORLD, 1929-1930," was recently published at 20s. This most useful directory of the cotton industry contains 1,452 pages, most of which are of interest to cotton-mill men. Among the various sections, those giving lists of manufacturers, of cotton mill supplies, textile machinery, chemicals, electrical machinery, and artificial silk will be of value to the cotton spinners and manufacturers. Other sections give complete lists of cotton merchants, exporters, brokers, cotton waste merchants, spinners and manufacturers, etc., in all countries of the world.

"THE COTTON SPINNERS AND MANUFACTURERS' DIRECTORY OF LANCASHIRE" (Forty-fifth edition), published by John Worrall Ltd., Central Works, Oldham, at 16s., is a very comprehensive directory of the cotton spinners, doublers, manufacturers, bleachers, dyers, finishers, situated in Lancashire. Other very useful chapters give lists of the managers, secretaries, and salesmen of each mill, fabrics and yarns produced, annual holidays, etc. It should be noted that a pocket edition of this directory is also published at 12s. 6d.

"THE CONTINENTAL DIRECTORY OF COTTON SPINNERS AND MANUFACTURERS." By John Worrall Ltd., Central Works, Oldham. The 1929-30 edition at 16s. net has recently been issued. As its predecessors, it can be thoroughly recommended It contains particulars of 4,774 firms and covers the whole of the Continent.

"LE COTONNIER," by Ray C. P. Boone, Paris, Société d'Editions Geographiques, Maritimes et Coloniales, 184, Boulevard Saint Germain. The author deals in this French book of 300 pages, containing some very excellent photographs, with 18 different varities of cotton, selection, heredity, hybridization, and at the end of the book he gives an extensive cotton bibliography. The book has been written for the cotton planter with more than average education; it has for its object the improvement and the spread of cotton cultivation. The author has other books on cotton growing in preparation, and whilst this first volume deals with the scientific aspects, a second volume will describe the cultural methods. Other books will discuss the ginning, baling, classing, etc.

The author seems somewhat optimistic in his belief "that in the near future Great Britain will be able to obtain from her dominions and colonies all the cotton, without having recourse to American cotton," and, further, he has evidently an exaggerated opinion of the possibilities of the French Colonies, as he states that "thanks to France's numerous colonies, she will be in a position to produce all the cotton required by her cotton industry"

"HUMAN FACTORS IN COTTON CULTURE," by Rupert B. Vance, published at 13s. 6d. by Humphrey Milford, Oxford University Press, Warwick Square, London, E.C.4, or Bartels Hof, Markt 8, Leipzig, C.1. In this book Mr. Vance deals with a subject which should be brought to the attention of the cotton consumers of the world; the author writes of the deplorable social and economic conditions under which cotton is produced in the United States Cotton Belt, but he offers no solution for the present intolerable situation.

The author describes the grossly unfair system of share cropping and the miserable conditions under which these poor agriculturalists, both white and coloured, have to live. He includes in his book interesting tables on the average income per head of different types of cotton farmers, their yearly budgets, etc.

Such conditions as exist in the Cotton Belt are not to be found in any country in Europe.

"THE APPLICATION OF SCIENCE TO CROP PRODUCTION," by Albert Howard, C.I.E., M.A., and Gabrielle L. C. Howard, M.A., published by Humphrey Milford, the Oxford University Press, at 5s. net.

This book is the result of the writer's 20 energetic years' activities in India, engaged in exploring the directions in which botanical science can profitably be applied to the crops of that country. The organization of an Agricultural Research Institute was undertaken by the authors in 1919 at Indore. The general objects and the lines of work are: (*a*) The establishment of an Agricultural Research Institute for the Indian Central Cotton Committee at which fundamental investigations on cotton can be undertaken. In addition a critical study of cotton growing on the black soils of India, and the production of improved cottons for Central India and Rajputana, both for dry and for irrigated conditions, will be undertaken. (*b*) The training of post-graduate students nominated by the Central Cotton Committee. (*c*) The provision of an agricultural centre for the States of Central India and Rajputana, which will serve as an object lesson for the development of this portion of India, and at which officers and cultivators, nominated by the Darbars, can be trained. The authors describe minutely the arrangement of the buildings and the working of the organization.

OTHER BOOKS RECEIVED.

"THE ECONOMIC AND FINANCIAL SITUATION IN EGYPT." Report by R. M. Turner, O.B.E., Commercial Secretary, Cairo, published at 2s. 6d. by H.M. Stationery Office, Adastral House, Kingsway, London, W.C.2.

"LANCASHIRE BETRAYED," by Ernest E. Canney, published at 3s. 6d., by John Heywood Ltd., Manchester.

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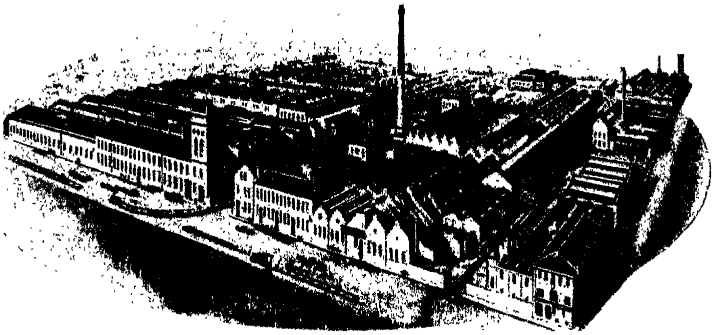

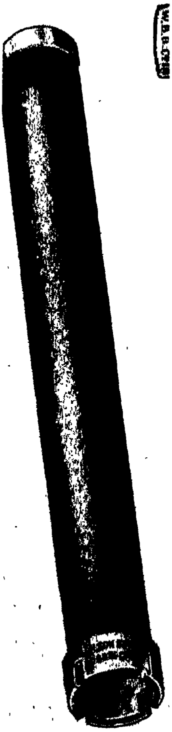

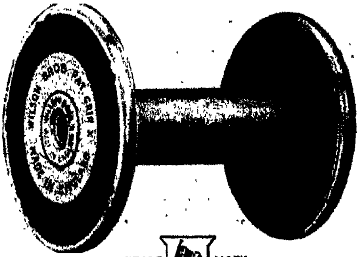

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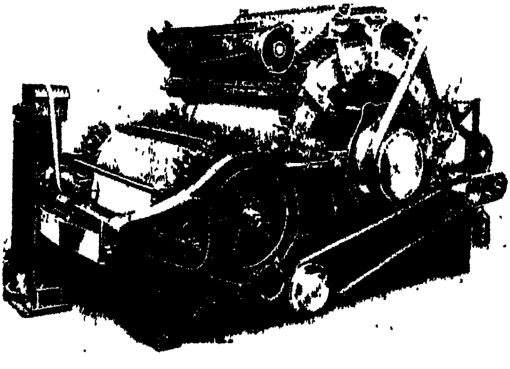

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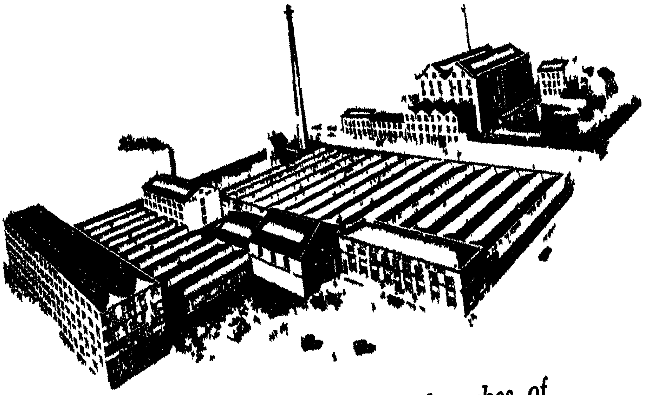

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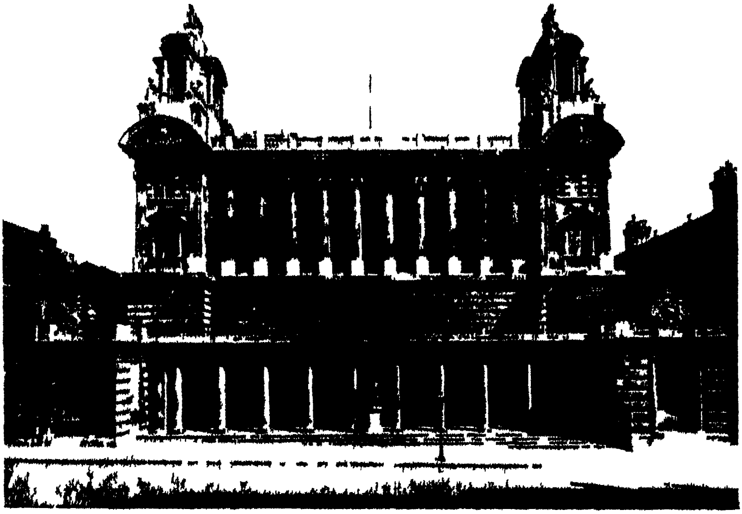

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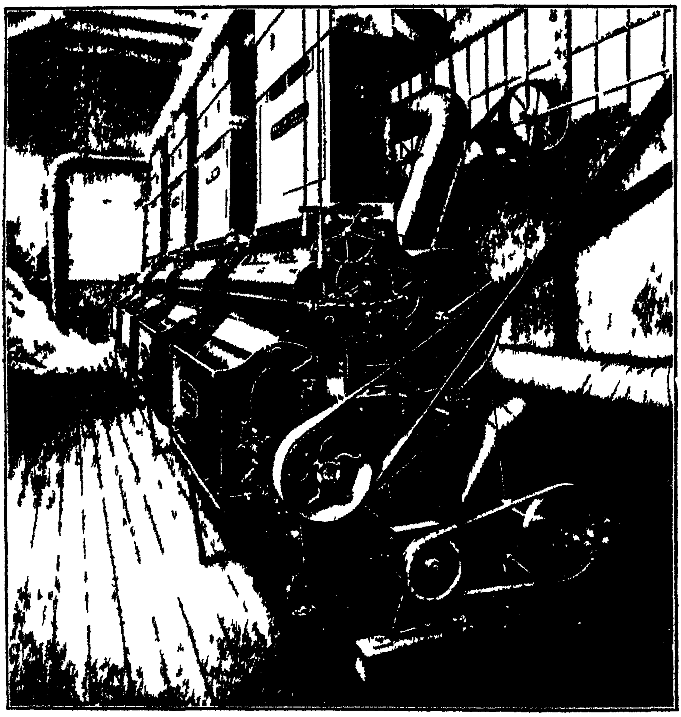

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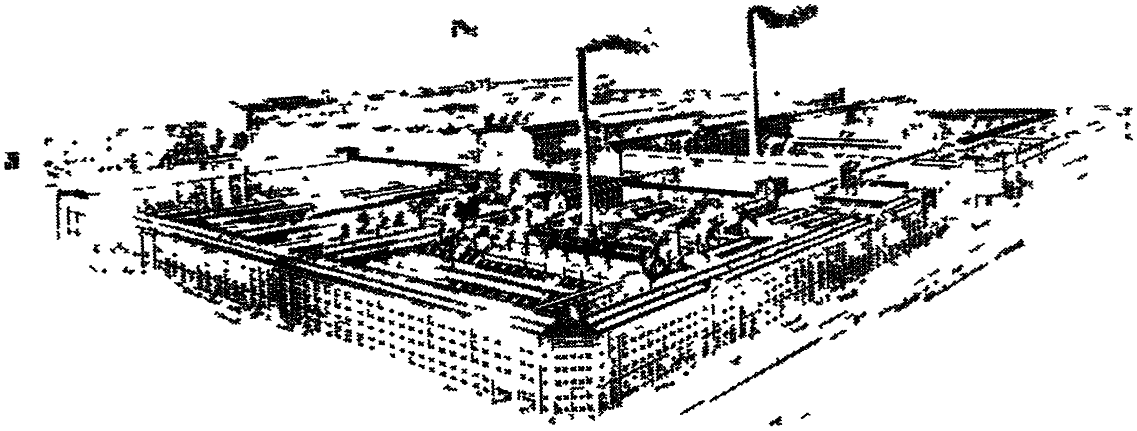

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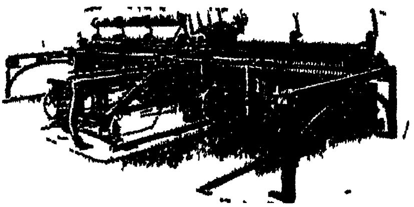

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INTERNATIONAL COTTON BULLETIN

No. 30. Vol. VIII, 2. January, 1930

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JOINT EGYPTIAN COTTON COMMITTEE MEETING.

The next meeting of the Joint Egyptian Cotton Committee will take place on May 4th, 1930, at the Hotel des Iles Borromées, Stresa, Italy.

Among the subjects to be discussed are:—

Consideration of humidity tests of Egyptian cotton received from the various countries.

Report on the position of the Alexandria General Produce Association with regard to the Barcelona Congress Resolution on Humidity in Egyptian Cotton.

The Development of the Egyptian law relating to the prevention of mixing of different varieties of cotton.

INTERNATIONAL COTTON COMMITTEE MEETING.

A meeting of the International Committee will take place at the Hotel des Iles Borromées, Stresa, Italy, on the 5th and 6th May next, when several important subjects are due for discussion. Among these are:—

Cotton Propaganda.

Associate Membership to the International Cotton Federation.

Arbitration on Raw Cotton.

Cotton Industry Enquiry by the Labour Bureau of the League of Nations.

REPORTS FROM ASSOCIATIONS.

AUSTRIA.

Spinning Section. Conditions of sale in cotton yarns have not appreciably improved during the last quarter of the year 1929 in comparison with the first three quarters of the year. It is true to say that in the month of September, and also in a lesser degree during December, a slight revival in demand was noticeable. However, this feature was of short duration, and the result was rather a long period of sales stagnation. Still, the general situation of the sales effected by the weaving firms is less unsatisfactory than the conditions of prices which apply just as before the margin of losses. As regards the export of cotton yarn up to and including September 1929, official reports are to hand and furnish the following figures:—

EXPORT OF COTTON YARNS IN THE FIRST NINE MONTHS.
In metric quintals (100 kilos).

	1929	1928	1927
Raw	71,711	82,596	94,947
Bleached or mercerised	7,037	8,657	6,432
Dyed, printed	2,460	3,331	3,298
Giving a total of	81,208	94,584	104,677

It will be seen from these figures that the exports for the first three quarters in 1929, in comparison with the year 1928, have decreased by 14.1 per cent. and in comparison with the year 1927 by 22.4 per cent. In contrast with these statistical returns we have to consider:—

THE IMPORT OF COTTON YARNS, metric quintals (100 kilos), showing the following figures:—

	1929	1928	1927
Raw	13,957	16,944	16,505
Bleached or mercerised	1,108	1,180	1,119
Dyed or printed	2,087	1,666	1,410
Giving a total of	17,152	19,790	19,034

These figures indicate that the imports of yarns during the first three quarters in the year 1929 have decreased in comparison with 1928 by 13.3 per cent., and in comparison with 1927 by 9.9 per cent. The diminution of the export trade is therefore, in comparison with the year 1927, especially remarkable, as exports of yarn have fallen 2¼ times more than the imports.

The very unsatisfactory trend of business, which still continues, has led to a limited production and has compelled firms to close down completely. In the course of about 1½ years, 30 per cent. of the Austrian spindles have come to a standstill. In spite of this fact the difficulty of making sales continues, and for this reason further measures will have to be undertaken which will tend to reduce the output.

The prospects of the probable condition of the spinning industry in the future are characteristically indicated by the above statements. For the time being there cannot be noted any appreciable change which would lead to the supposition of a nearby improvement in the general condition of the industry. All the more so as the situation of the weaving industry is becoming more and more unfavourable.

Weaving Section. The conditions of prices and sale have been unsatisfactory in the last quarter of 1929. The excessive fall of prices on the market caused by increased competition on the home weaving mills and imports from abroad resulted in losses on the part of firms producing grey cloth, and those manufacturing coloured goods have seen their profits still further reduced, and these were already low enough. There is no doubt that owing to the continuously decreasing purchasing power of the population, we are now faced with a disparity in the offers of cloth by domestic and foreign producers, and that in consequence symptoms of depression are bound to ensue. Trade in cotton fabrics during the first three quarters of 1929 may be seen from the following figures which are quoted from the official statistical returns:—

IMPORTS IN METRIC QUINTALS (100 kilos).

	1929	1928	1927
Raw	40,925	49,761	45,470
Bleached	6,145	7,063	7,617
Dyed	5,927	6,389	6,387
Printed	2,514	2,327	3,308
Multi-coloured	13,461	13,692	13,659
Total	68,972	79,232	76,441

These figures prove that the import of cloth has decreased in comparison with 1928 by 12.9 per cent., and in 1927 by 9.4 per cent.

EXPORTS IN METRIC QUINTALS (100 kilos).

	1929	1928	1927
Raw	1,315	1,318	4,352
Bleached	7,841	7,809	6,387
Dyed	2,524	3,096	3,187
Printed	8,720	11,074	10,233
Multi-coloured	4,954	4,896	4,181
Total	25,354	28,193	28,340

According to these figures the export of cloth has decreased in comparison with 1928 by 10 per cent. and in 1927 by 10½ per cent. From the total exports in 1929 16.023 metric quintals or 63.1 per cent. resulted in favour of the so-called making-up trade in foreign goods, so that, with reference to this portion of the exports, the home industry was only interested in cloth-finishing operations.

The persistently unfavourable business situation has also led to reductions of output and stoppages in the weaving industry. Although this reduction did not take place in the same proportion as in the spinning, it is anticipated that further steps in that direction will have to be resorted to should it be found impossible to check by State action the comparatively high import of fabrics.

The original report in German follows:—

Baumwollspinnerei. Die Absatzverhältnisse in Baumwollgarnen haben sich im letzten Quartal des Jahres 1929 gegenüber den ersten 3 Quartalen nicht wesentlich gebessert. Zwar hat sich im September und vorubergehend auch im Dezember eine leichte Belebung der Nachfrage gezeigt, doch war diese Erscheinung von ganz kurzer Dauer und hatte Rückschläge in Form von längeren Verkaufsstockungen zur Folge. Immerhin ist der Gesamt verkaufsstand der Spinnereien weniger unbefriedigend als die Preislage, welche nach wie vor eine Verlustmarge bedingt. Uber die Ausfuhr von Baumwollgarnen bis einschliesslich September 1929 liegen die amtlichen Ausweise vor und zeigen folgendes Bild:—

AUSFUHR VON BAUMWOLLGARNEN IN DEN ERSTEN DREI QUARTALEN (in Meterzentnern).

	1929	1928	1927
Roh	71,711	82,596	94,947
Gebleicht od. merzerisiert	7,037	8,657	6,432
Gefärbt, bedruckt	2,460	3,331	3,298
Daher zusammen	81,208	94,584	104,677

Aus diesen Ziffern geht hervor, dass der Export in den ersten 3 Quartalen des Jahres 1929 gegenüber dem Jahre 1928 um 14.1% und gegenüber dem Jahre 1927 um 22.4% zurückgeblieben ist. Dem gegenüber zeigt die Statistik der

BAUMWOLLGARN EINFUHR (in Meterzentnern) folgendes Bild:--

	1929	1928	1927
Roh	13,957	16,944	16,505
Gebleicht od. merzeresiert	1,108	1,180	1,119
Gefärbt, bedruckt	2,087	1,666	1,140
Daher zusammen	17,152	19,790	19,034

Somit ist die Garneinführ in den ersten drei Quartalen 1929 zurückgegangen: gegenüber 1928 um 13.3% und gegenüber 1927 um 9.9%. Besonders augenfällig ist daher die Verschlechterung des Aussenhandelsverkehrs gegenüber 1927, da die Garnausfuhr um das 2¼-fache des Importes gesunken ist.

Der anhaltend schlechte Geschäftsgang hat zu weiteren Produktionseinschränkungen, darunter auch zu vollständigen Betriebsstillegungen gezwungen. Im Laufe von cca. 1¼ Jahren sind an 30% aller in Oesterreich befindlichen Spindeln zum Stillstand gekommen. Dennoch bestehen die Absatzschwierigkeiten fort

und es ist daher damit zu rechnen, dass die Einschrankungsmassnahmen eine Fortsetzung erfahren werden.

Mit den vorstehenden Bemerkungen sind auch die Aussichten für die voraussichtliche Gestaltung des Spinnereigeschäftes in der nachsten Zukunft gekennzeichnet. Irgendwelche Anhaltspunkte für die Annahme einer fühlbaren Besserung der Gesamtlage sind vorerst nicht festzustellen, zumal sich auch die Situation der Webindustrie ungünstig gestaltet.

Baumwollweberei. Sowohl die Preis- als auch die Absatzverhaltnisse waren im letzten Quartel des Jahres 1929 unbefriedigend. Der Preisdruck, welcher durch den verscharften Wettbewerb der inländischen Webereien und durch den anhaltend starken Auslandsimport auf den Markt ausgeübt wird, hat in der Rohwarenweberei zu einer Verlustmarge, in der Buntweberei zu einer Verringerung der schon vorher bescheiden gewesenen Rentabilität geführt. Es steht ausser Zweifel, dass die fortgesetzt sinkende Kaufkraft der Bevolkerung in ein Missverhältnis zu dem in- und auslandischen Gewebeanbot geraten ist, woraus sich notwendigerweise Depressionserscheinungen ergeben müssen. Die Aussenhandelbewegung in Baumwollgeweben während der ersten drei Quartale des Jahres 1929 ist aus den folgenden Ziffern der amtlichen Statistik zu ersehen.

EINFUHR (in Meterzentnern) :—

	1929	1928	1927
Roh	40,925	49,761	45,470
Gebleicht	6,145	7,063	7,617
Gefärbt	5,927	6,389	6,387
Bedruckt	2,514	2,327	3,308
Buntgewebt	13,461	13,692	13,659
Daher zusammen	68,972	79,232	76,441

Somit ist die Gewebeeinfuhr gefallen: gegenüber 1928 um 12.9% und gegenüber 1927 um 9.4%.

AUSFUHR (in Meterzentnern) :

	1929	1928	1927
Roh	1,315	1,318	4,352
Gebleicht	7,841	7,809	6,387
Gefärbt	2,524	3,096	3,187
Bedruckt	8,720	11,074	10,233
Buntgewebt	4,954	4,896	4,181
Daher zusammen	25,354	28,193	28,340

Demnach ist die Gewebeausfuhr zurückgegangen: gengenüber 1928 um 10%, und gegenüber 1927 um 10½%. Von der Gesamtausfuhr des Jahres 1929 entfielen 16,023 Meterzentner oder 63.1% auf den sogen. Veredlungsverkehr mit ausländischer Ware, so dass an diesem Teil des Exportes die inländische Industrie nur in Form der Gewebeveredlung beteiligt war.

Auch in der Weberei hat die enhaltend ungünstige Geschäftslage zu Betriebseinschränkungen und Stillegungen, wenn auch

nicht in dem gleichen Umfange wie in der Spinnerei, genotigt und es ist mit weiteren Massnahmen dieser Art zu rechnen, wenn es der Industrie nicht mir staatlicher Hilfe gelingt, den unverhaltnismassig hohen Gewebeimport einzudämmen.

(*Verein der Baumwollspinner und Weber Oesterreichs.*)

BELGIUM.

Spinners are successful in their efforts to dispose of their output in the country by following a low-price policy, and there are hardly any signs of an increase in the accumulation of the stocks of yarn. The low quotations for raw cotton are having a favourable influence over the volume of sales, whilst, on the other hand, export transactions in cotton yarn prove more and more difficult.

In the weaving industry operations are carried on in a normal manner for the country. Weaving centres like Renaix, which export nearly all their output, are facing serious difficulties and are resorting to a partial stoppage of their looms.

Basic salaries ruling on March, 1923, were increased by 5 per cent. on the 15th October last. The total increase on the wages list price amounts at present to 125 per cent.

The following is the original French article:—

La filature parvient à écouler sa production dans le pays en suivant une politique de bas prix et on ne constate guère d'aggravation dans les stocks de filés. Les bas cours du coton brut influencent favorablement la vente. Les exportations de filés de coton deviennent par contre de plus en plus difficiles.

Le tissage travaille d'une manière normale pour le pays. Les centres de tissages qui comme Renaix exportent presque toute leur production sont aux prises avec de sérieuses difficultés et sont obligés de chômer partiellement.

Les salaires de base de mars 1923 ont été majorés de 5 pour cent le 15 octobre. La majoration totale sur ces salaires de base est actuellement de 125 pour cent.

(*Société Coopérative Association Cotonnière de Belgique.*)

CZECHO-SLOVAKIA

The position of the Czecho-Slovakian cotton spinning industry has improved somewhat during the last three months of 1929. However, in spite of this improvement many mills are still working on a much reduced capacity, for only few firms are able to run double shifts. On an average the production is about 90 per cent. of full capacity.

Owing to the restriction of yarn production, in spite of the somewhat larger deliveries that had been maintained, a slight decrease in yarn stocks took place.

During the above period a better enquiry for yarns could be noticed for the home market; futhermore, demand in the export market was appreciably better than in the previous months. Nevertheless this better demand was due more to the usual seasonal activity, as preliminary conditions for a real improvement are not yet apparent. In November the newly received orders outbalanced the reduced production. Yarn prices, however, remained totally unsatisfactory. At the end of the year orders on hand were for about three to four months.

Exports of cotton yarns remained fairly stable in each month of the last half year. Exports of other cotton goods rose gradually during the last months, without, however, equalling the exports of the same period of the previous year.

The following is the original report in German:—

Die Lage der csl. Baumwollspinnerei hat sich in den letzten 3 Monaten des Jahres 1929 etwas günstiger gestaltet. Trotz dieser Besserung laufen viele Betriebe noch immer stark reduziert, wogegen nur wenige Firman in Doppelschicht arbeiten. Im Durchschnitte beträgt die Ausnützung der Kapazität nicht ganze 90%.

Durch die Drosselung der Garnerzeugung, die trotz der etwas erhöhten Ablieferungen beibehalten wurde, hatte eine gewisse Erleichterung in den Garnlagerbestanden zur Folge, die im Laufe des Jahres sehr stark angewachsen war.

In den erwähnten Perioden konnte auf dem Inlandsmarkte einelebhaftere Nachfrage nach Garnen beobachtet werden; aber auch im Export geschäfte war der Absatz von Garnen bedeutend besser als in den früheren Monaten. Doch ist diese erhöhte Nachfrage nach Baumwollgarnen mehr in der saisonmässigen Belebung des Geschäftes begründet, da die Vorbedingungen für eine anhaltende Konjunkturbesserung nicht gegeben sind. Im November übertstiegen die neueingelaufenen Aufträge die allerdings eingeschränkte Produktion. Die Garnpreise aber bleiben noch bei weitem unbefriedigend. Die Auftragsbestände am Ende des Jahres beschäftigen die Spinnereien noch etwa 3 bis 4 Monate.

Die Ausfuhr von Baumwollgarnen ist in den einzelnen Monaten des verflossen Halbjahres ziemlich stabil geblieben. Die Ausfuhr anderer Baumwollwaren stieg in den letzten Monaten allmählich an, ohne jedoch die Ausfuh des gleichen Zeitraumes im Vorjahre zu erreichen.

(*Wirtschafts-Verband Csl. Baumwollspinnereien.*)

ENGLAND.

The position in the American section of the cotton spinning industry shows no signs of improvement and is practically the same as in the previous quarter. The Federation of Master Cotton Spinners' Associations recommended a full week's stoppage at Christmas.

In the Egyptian section of the trade there has been a falling off in business and consequently in employment, but hopes are entertained that the new year will witness an improvement in conditions generally.

ESTHONIA.

Business in textiles, both in the wholesale and retail branches, has been seriously depressed during the last quarter of 1929. Good yields of crops gave hopes for an abundant trade, but a result of the good crops was that prices for agricultural products fell very sharply, so that a certain amount of stagnation took possession of the market, accompanied unfortunately by a shortage of money and a disinclination to buy, etc.

An uncommonly bad influence on business has been caused by the abnormal winter weather conditions. Continuous downfalls of rain, the absence of the usual and necessary winter frosts have made the roads in the country almost impassable, so that business has suffered. All hopes centre on the setting in of normal frosts by means of which the present situation is sure to improve.

Working hours in the textile factories of Esthonia remain unchanged.

The mills have orders on hand for about two months. No alteration has taken place with regard to wages.

The following is the original German text received from Kraehnholm:—

Der Handel in Textilerzeugnissen — sowohl en gros als auch en detail — hat in den irerten quartes von 1929 leider unter dem Zeichen einer gewissen Depression gestanden. Ein allgemein guter Ernteertrag berechtigte ursprünglich zu den besten Hoffnungen auf einen flotten Handel; als Folge der guten Ernte sind die Preise für landwirtschaftliche Erzeugnisse jedoch stark gefallen, so dass im Absatz eine gewisse Stignation einegetreten ist mit den üblichen Begleiterscheinungen einer solchen — Geldmangel, Kaufunlust etc.

Eine ungemein schlechte Einwirkung haben ausserdem die absolut unnormalen Witterungsverhältnisse auf den Handel ausgeübt. Fortlaufende Niederschläge, das Ausbleiben der notwendigen Winterfröste haben die Wegeverhältnisse auf dem Lande in einen unhaltbaren Zustand gebracht unter dem der ganz Handel und Wandel zu leiden haben. Aller Hoffnung ist eben auf das Eintreten einer richtigen Winterwitterung gerichtet, wodurch sich das augenblickliche Bild zum Besseren wenden müsste.

Die Arbeitszeit in den Textilfabriken Estlands ist unverändert, die alte geblieben.

An Arbeitsmöglichkeiten sind die Fabriken für ca. 2 Monate voraus mit Orders versehen.

In den Lohnverhältnissen sind keine Aenderungen eingetreten.

FRANCE.

We are able to report quite an improvement in the position of American cotton spinners during the last quarter of 1929, due to an improved home demand. No alteration has taken place in the situation of the Egyptian section since the publication of Bulletin No. 29. As regards the weaving section, which benefited by the low prices of the American spinning section, it is experiencing a difficult situation owing to the improvement of the latter; their usual prices not having been raised in the same proportion as the price of American yarns which they employ.

There is no important modification in the amount of stocks or the orders on hand. Neither has there been any change in wages during the quarter under review.

Sales for export have shown important reductions in 1929 as compared with 1928. As regards cotton cloth, this decrease has been partly offset by a better demand from the French Colonies, which is the principal export market of the French cotton industry.

The original report in French follows:

Pendant le dernier trimestre de 1929, par suite d'une meilleure demande du marché intérieur, on a enfin constaté une amélioration assez sensible de la situation de la filature Amérique qui avait été plus particulièrement atteints par la crise. — Pas de modification dans la situation de la filature de coton égyptien depuis la publication du Bulletin No. 29. — Quant au tissage qui bénéficiait des prix bas pratiqués par la filature Amérique, il a vu sa situation plutôt alourdie par l'amélioration de cette dernière branche, ses propres prix n'ayant pu être revlevés dans la même proportion que ceux des filés Amérique qu'il emploie.

Pas de modification essentielle en ce qui concerne les stocks et les ordres en carnet. Aucune modification de salaires n'est intervenue au cours du trimestre en revue.

Les ventes à l'exportation sur le marché étranger proprement dit sont en sensible regression en 1929 par rapport à 1928. En ce qui concerne les tissus de coton, cette regression est en partie compensée par une meilleure demande du marché colonial français qui est le principal débouché extérieur de l'industrie cotonnière française.

I.—IMPORTATIONS (IMPORTS).

COMMERCE EXTÉRIEUR.	3ème trimestre, 1929 (3rd quarter, 1929) Quintaux métriques (Metric quintals)
Fils de coton (Cotton yarns)	7,331
Tissus de coton (Cotton goods)	5,539

II.—EXPORTATIONS (EXPORTS).

FILS DE COTON (Cotton yarns) : Exportations totales (Total exports)	38,607
PRINCIPAUX PAYS DE DESTINATION (Principal Countries of Destination) :—	
Algérie, Colonies françaises et pays de protectorat (Algeria, French Colonies and Protectorates)	4,131
Allemagne (Germany)	6,326
Union Economique Belgo-Luxembourgeoise (Economic Union of Belgium and Luxemburg)	9,106
Pays-Bas (Holland)	4,708
Suisse (Switzerland)	4,164
Pologne (Poland)	1,437
République Argentine (Argentine)	1,570
TISSUS DE COTON (Cotton goods) : Exportations totales (Total exports)	153,931

PRINCIPAUX PAYS DE DESTINATION (Principal Countries of Destination) :—

Algérie, Colonies françaises et pays de protectorat (Algeria, French Colonies and Protectorates)	87,763
Allemagne (Germany)	4,179
Angleterre (Great Britain)	9.756
Suisse (Switzerland)	6,879
Union Economique Belgo-Luxembourgeoise (Economic Union of Belgium and Luxemburg)	9,581
République Argentine (Argentine)	4,467
Etats-Unis (United States)	4,492
Pays-Bas (Holland)	1,445
Grèce (Greece)	1,062

(*Syndicat Général de l'Industrie Cotonnière Française.*)

GERMANY.

Spinning Section. The last quarter of 1929 did not bring any important alteration to the situation in the German cotton-spinning industry. The purely seasonal increase in business which took place at the end of the third quarter did not continue longer than into October and the middle of November. Since then business conditions have again been very quiet.

Yarn orders, on the whole, are only obtainable for quick delivery, prices remaining totally inadequate.

In spite of the passing activity in demand, no important alteration has taken place in the hours worked in the German cotton-spinning industry as compared with the previous months.

The original report in German follows:—

Auch das 4. Quartal 1929 hat keine wesentliche Aenderung in der allgemeinen Lage der deutschen Baumwollspinnerei gebracht. Die am Schluss des 3. Quartals eingetretene rein saisonmässige Belebung des Geschäftes hat zwar während des Oktobers und bis etwa Mitte November angedauert; seit diesem Zeitpunkt ist jedoch wieder eine weitgehende Geschäftsstille zu verzeichnen gewesen.

Die Garnabschlüsse wurden im allgemeinen nur mit Kurzer Lieferfrist getätigt, die Preise blieben nach wie vor völlig unzulänglich.

Auch im Beschäftigungsgrad der deutschen Baumwollspinnereien ist trotz der vorübergehenden Belebung der Nachfrage keine wesentliche Aenderung gegenüber den Vormonaten eingetreten.

(*Arbeitsausschuss der Deutschen Baumwollspinnerverbände.*)

Weaving Section. When compared with the previous periods, the general condition of the German cotton-weaving industry did not undergo any appreciable change during the fourth quarter of 1929. The revival which occurred in October, and continued, created no surprise, as this is a seasonal feature of the industry. Customers try to avoid long-term contracts as much as possible. Orders booked up to the end of the year remain appreciably below the normal. The reduction in output has still been maintained, although in a few special cases slight revivals were noticed in the course of the fourth quarter.

The prices are, as before, disappointing.

The original report follows:—

Weberei. Die allgemeine Lage der süddeutschen Baumwollweberei hat im 4. Vierteljahr 1929 keine wesentliche Aenderung gegenüber der Vorzeit erfahren. Die im Oktober eingetretene Belebung des Geschaftes war saisonmassig bedingt und nur vorübergehend. Die Abnehmerschaft vermeidet Kontrakte auf längere Sicht. Der am Schlusse des Jahres vorhandene Auftragsbestand bleibt hinter einem normalen Auftragsbestand wesentlich zurück. Die Betriebseinschränkungen sind weiterhin aufrecht erhalten worden, wenn auch in einzelnen Fällen im Laufe des 4. Vierteljahres eine massige Besserung der Beschaftigung erzielt werden konnte.

Die Preise sind nach wie vor unbefriedigend.

(*Verein der Suddeutscher Baumwoll Industrieller.*)

HOLLAND.

The spinning section shows little improvement. Although most mills are working full time, and stocks of yarn do not seem to be large, the offtake is very erratic and most sales are only for prompt delivery, while only few contracts for forward delivery can be obtained. The margins for most counts are unsatisfactory, especially for coarse ring twist.

Conditions in the weaving section have changed for the worse. The demand for home trade is not unsatisfactory, but most manufacturers complain about the prices obtainable. For export the demand is very poor, especially for the Netherlands-Indies, where the markets are overstocked. The manufacturers engaged in this trade are complaining very much, and in many cases they have reduced their production either by working shorter hours or by stopping part of their looms.

HUNGARY.

The foreign trade statistics of Hungary for the first nine months of 1929 give the following details for cotton manufactures:—

	Double zentners.*	
	Jan.–Sept., 1929.	Jan.–Sept. 1928.
Imports:—		
Raw cotton	88,609	61,177
Cotton yarns	39,288	48,162
Cotton goods	54,959	77,217
Exports:—		
Cotton yarns	2,591	2,178
Cotton goods	9,582	12,191

* Double zentner = 100 kilos.

As will be seen from the above data, imports of raw cotton have considerably increased; this is due to the erection of three new cotton spinning mills in 1929. For the same reason, imports of cotton yarn have decreased. Imports of cotton goods have also decreased by approximately 30 per cent., but during this period the domestic production of cotton goods has risen. On the other hand the internal market prices and credit conditions turned out to be continually unfavourable, and it is expected that domestic production in those months of 1929 not covered by the above statistics will also show a falling off.

The original report in German follows:—

Der Aussenhandel Ungarns in den ersten 9 Monaten des Jahres 1929 zeigt in Artikeln der Baumwollindustrie folgende Daten:—

	Doppelzentner.	
	1929. I–XII.	1928. I–XII.
Einfuhr :—		
Rohbaumwolle	88,609	61,177
Baumwollgarne	39,288	48,162
Baumwollgewebe	54,959	77,217
Ausfuhr :—		
Baumwollgarne	2,591	2,178
Baumwollgewebe	9,582	12,191

Wie aus obigen Daten ersichtlich, hat die Einfuhr von Rohbaumwolle wesentlich zugenommen, was auf die Gründung von drei neuen Baumwollspinnereien im Jahre 1929 zurückgeführt werden kann. Aus demselben Grund ist auch die Einfuhr von Baumwollgarnen zurückgegangen. Mit ungefähr 30% hat sich auch der Import von Baumwollgeweben vermindert und parallel hiemit ist die Produktion der einheimischen Baumwollwebereien im Laufe des Jahres 1929 gestiegen, so dass die Fabriken im allgemeinen einen vollen Betrieb unterhielten. Da aber auf dem inländischen Markte sowohl die Preis- wie die Kreditverhaltnisse sich dauernd ungünstig gestalten, ist damit zu rechen, dass in den restlichen, statistisch noch nicht ausgewiesenen Monate des Jahres 1929 in der einheimischen Produktion ebenfalls ein Rückgang zu verzeichnen sein wird.

(*Magyar Textilgyárosok Országos Egyesülete.*)

ITALY.

The conditions of the Italian cotton industry during the fourth quarter of this year, from the purely statistical point of view, do not show any notable variations as compared with the previous quarter.

Work in the spinning and weaving mills was regular, the stocks in hand are normal, and the exports of cotton goods, in quantity, are increasing.

From the economic point of view, however, the situation cannot be said to be satisfactory, seeing that the sales both at home and for export have only realized prices leaving very little or no margin at all.

Payments are made almost normally.

(*Associazione Italiana Fascista degli Industriali Cotonieri.*)

SPAIN.

During the past half year the textile market has presented most prominently the following features.

The general situation of the country may be described briefly thus: Work in the factories has for quite a long while been uninterrupted by trade disputes; there is abundance of employment for labour through the extension of public works initiated by the Government, and the crops have maintained their customary average. These favourable elements have been countered by the permanent obstacle of low wages, especially for farm workers, which persists in the majority of the districts of Spain; exceptions are Cataluña, Vascongadas, Asturias and Valencia. The advantages of this normal situation have, however, been diminished, and in some cases effaced, by the sudden and sharp rise in the rate of exchange, which has compelled the majority of the employers to pay for their cotton contracts at a higher rate of exchange than could have been anticipated, with consequent losses for the shareholders. The Spanish market has suffered also in consequence of the world-wide crisis which exists in the use of cotton for clothing. The inclination of the consumer continues in the direction of giving a preference to silks and rayons, which has obliged employers to develop in this direction, with the inevitable embarrassments, expenses and trouble which this class of goods brings in the transformation or adaptation of their equipment.

The Comité Oficial Algodonero has continued to intervene for the purpose of lessening somewhat the effects of the problem of over-production existing in Spain compared with its trifling export of manufactured goods, but without succeeding in producing any evident impression on our cotton market.

SWITZERLAND.

In general, the situation of the cotton industry during the last three months of last year went from bad to worse, in most cases forward business is only-undertaken at a loss, due to the fact that the industry is helpless against the low prices offered by buyers. It rarely happens that the manufacturer receives the equivalent of the actual cost price, and still less an actual profit.

The coarse and medium-fine spinners reported a slight increase in activity without, however, an improvement in prices. Nevertheless this slight improvement did not suffice to cause any reduction of short-time working. For the fine-spinning section good prospects declined earlier, so that a few mills which are already working on a 30 per cent. reduction are considering further curtailment. In the doubling section conditions have so tapered off that, in spite of important reductions in production, more doubling spindles will have to be brought to a standstill. Medium-fine cloths solely, owing to low prices and short terms of delivery, have established a brisk enquiry. The coarse weaves, as before, remain neglected, so that some firms, after year-long unsuccessful competition, are preparing to close indefinitely. The heavy depression is now being felt by the fancy-goods manufacturers, who so far had been fully occupied, in so far as at the end of December approximately one-half of the mills were working at a reduction of 10 to 30 per cent.

At the end of this exceedingly dismal year it is regrettable that no prospects for any improvement are discernible in the near future

The original report in German follows:—

Im allgemeinen hat sich die Marktlage für Baumwollfabrikate in den letzten drei Monaten des vergangenen Jahres weiter verschlechtert, die Weiterbeschaftigung der Betriebe ist in den meisten Fällen mit Verlusten verbunden, da die Industrie bei dem herrschenden Ueberangebot dem Preisdruck der Kaufer schutzlos preisgegeben ist. Nur selten gelingt es, für die Fabrikate, den Ersatz der eigenen Selbstkosten einzutauschen und noch weniger eine bescheidene Gewinnmarge zu erzielen.

Die Grob- und Mittelfeinspinnerei registriert eine leichte Hebung der Beschäftigung als glückliche Ausnahme, ohne dass aber die Preise davon profitiert hatten. Immerhin reichte das leichte Anziehen nicht einmal zu einem spürbaren Abbau der Betriebsreduktionen aus. Für die Feinspinnerei haben sich die Aussichten eher verschlechtert, sodass in einzelnen Betrieben, die heute schon mit Einschrankungen von mehr als 30 Prozent arbeiten, weitergehende Reduktionen erwogen werden. In der Zwirnerei haben sich die Verhältnisse soweit zugespitzt, dass trotz teilweiser starker Produktionssenkung weitere Stillsetzungen von Zwirnspindeln erfolgen werden. Bei gedrückten Preisen und äusserst knappen Lieferfristen wird in der Mittelfeinweberei vereinzelt regere Nachfrage festgestellt, wahrend die Grobweberei nach wie vor vernachlassigt bleibt, sodass hin und wieder ein Betrieb nach jahrelangem erfolglosem Kampfe seine endgültige Schliessung vorbereitet. Die schwere Depression wirkte sich nun auch deutlich auf die bisher ordentlich beschäftigt gewesene Buntweberei aus, sodass Ende Dezember bereits die Hälfte der Betriebe Reduktionen zwischen 10 und 50 Prozent verzeichnet. Beim überaus düsteren Jahresabschluss fehlen leider jegliche Aussichten auf eine Besserung in naher Zukunft.

(*Verband der Arbeitgeber der Textile-Industrie.*)

U.S.A.

Statistical reports of production, sales and shipments of standard cotton cloths during the month of December, 1929, were made public to-day by The Association of Cotton Textile Merchants of New York. The figures cover a period of four weeks.

Production during the four weeks of December amounted to 243,735,000 yards, or at the rate of 60,934,000 yards per week.

Sales during December were 302,934,000 yards, or 124.3 per cent. of production. Shipments during the month were 214,148,000 yards, equivalent to 87.9 per cent. of production.

Stocks on hand at the end of the month amounted to 461,013,000 yards, representing an increase of 6.9 per cent. during the month. Unfilled orders on December 31st were 431,018,000 yards representing an increase of 25.9 per cent. during the month.

(*The Association of Cotton Textile Merchants of New York.*)

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COTTON GROWING IN NEW COUNTRIES

ALGERIA.

The cotton harvest is rather satisfactory except in the Penegaux region, where it is late, and fears are entertained that the cotton will not all be picked before the cold sets in.

Production in the department of Oran amounts to 40,000 centals (6,500 bales) of ginned cotton and 62,000 centals (3,100 short tons) of seed. *(International Institute of Agriculture, Rome)*

ARGENTINE.

Argentine cotton has during the last few years enjoyed a growing demand amongst cotton spinners. Most of the cotton received from the Argentine is strong, and though the length of fibre may be uneven the lower price ruling in the market has paid spinners for the extra work of classifying the cotton.

The following particulars have been extracted from the report of the French Commercial Attaché in Argentine.

The table reproduced herewith shows an almost constant expansion, and the reports to hand indicate that the possibilities of much larger crops exist. The Government has engaged an American expert who is in charge of a special cotton department. The experimental farms in Chaco, Corrientes, Formosa, are the most important ones, but the cotton from Argentine Chaco is the most promising of all.

Years	Area Sown hectares	Seed Cotton Produced tons	Lint Production tons	Export of Lint tons	Production of Seed tons	Export of Seed tons
1912–1913	2,800	- -	—	- -	—	—
1913–1914	2,217	-	-	-	—	-
1914–1915	3,300	2,640	792	26	1,795	—
1915–1916	3,780	2,052	885	54	2,007	—
1916-1917	3,075	2,460	689	152	1,722	—
1917–1918	11,775	9,420	2,638	727	6,594	—
1918–1919	13,135	10,058	3,047	1,382	7,250	1,204
1919–1920	13,350	10,680	3,097	3,012	7,446	3,748
1920–1921	22,864	19,088	5,536	2,691	13,171	2,110
1921–1922	15,615	12,490	3,497	4,028	8,743	2,142
1922–1923	62,658	43,860	5,636	3,452	13,409	2,503
1923–1924	22,864	19,434	12,758	5,057	30,636	4,544
1924–1925	104,513	51,105	14,455	11,057	35,636	4,600
1925–1926	110,058	96,400	31,300	22,641	60,180	15,115
1926–1927	71,746	42,000	13,101	9,246	31,196	1,472
1927–1928	85,000	75,410	23,200	8,364	47,150	1,690
1928–1929	105,000	—	—	—	—	—

The port of Barranqueras, situated opposite Corrientes, has become a great river shipping port. The quantities of cotton exported were in 1928 as follows:—

Spain	France and Belgium	Germany	England	Italy	Chile	
8,178	14,421	15,603	45,356	2,910	10	bales
1,844·2	3,348·8	3,548	110,661·6	645·1	2·2	tons

The Chaco type is carefully selected at the Government farms; its staple length is hardly 28 mm., often 23 to 25 mm.

Farmers have unfortunately started the vicious practice of damping the cotton for the purpose of gaining weight.

A movement is on foot to increase still further the tariffs on all imported manufactured cotton goods with a view to forcing spinners and manufacturers to establish themselves in that country and using Argentine cotton on the spot.

BARBADOS.

According to advices from Bridgetown, Barbados, the re-establishment of cotton growing is to be attempted by the Department of Agriculture. Last year, owing to the ravages of the boll-weevil, no cotton was grown on the island, but this year large quantities of seed were fumigated, and both the Government and private planters believe that the industry will again be profitable.

PERU.

According to the National Agricultural Society of Peru, the total acreage devoted to cotton cultivation in Peru for the coming season is placed at 115,000 hectares. The estimated production of cotton on this acreage is estimated at 210,000 bales.

COTTON PRODUCTION IN RUSSIA.

The Russian cotton crop is expected to be a little below the earlier expectations, due to the unfavourable effect of the early frosts, according to an official statement in the Russian paper *Economic Life* for November 14, 1929. The shortage of cotton can be compensated to some extent, in the opinion of the authorities, provided measures are taken to reduce local consumption in the cotton growing regions. Gathering of cotton this season is proceeding more rapidly than last year, but nevertheless is behind the "plan." By November 1, 1929, 33 per cent. of the total contracted quantity was gathered in Central Asia (Turkestan) as against 52 per cent. specified by the "plan." The quality of this year's crop is better than last year's.

RUSSIA'S "PLAN" FOR 1930-31 COTTON CROP.

The "plan" of contracts with cotton growers for acreage in 1930-31 calls for the planting of an area of 3,582,950 acres. The so-called "socialized sector" is expected to reach 15 per cent. of the total Central Asiatic (Turkestan) cotton area. Curtailment of appropriations for irrigation construction and fertilizers is considered as endangering the execution of next year's "plan" of cotton expansion. There is also some danger of delay in the delivery of tractors, some 2,200 of which were supposed to arrive in the cotton regions by February 1, 1930. So far 114 tractors have been delivered. In so far as the contemplated expansion of cotton is expected to take place through the displacement of the grain crops, the prospects do not appear to be very favourable, because of an insufficient grain supply in the cotton regions during the first quarter of the current agricultural year.

(*Foreign Crops and Markets.*)

SUDAN.

373,000 acres were planted to cotton in the Anglo-Egyptian Sudan this season. This is an increase of 95,000 acres over last year's earliest estimate of 278,000 acres. Production of the present crop is forecast at 170,649 bales of 478 pounds net, an increase of 32,285 bales over last year's first forecast of 138,364 bales of 478 pounds net. Last year's crop was finally estimated to be 142,000 bales.

GOVERNMENT COTTON PROGRESS REPORT FOR NOVEMBER, 1929

Variety	Area under Crop, Feddans	Picked to date, kantars of 315 rotls	Estimated Total Yield, kantars of 315 rotls
Gezira Sakel	174,000	—	522,000
Tokar Sakel	45,000	—	41,300
Kassala Sakel	50,000	—	95,000
Shambat, Kamlin and Dueim Sakel	550	—	2,000
Private Estates Sakel	3,900	300	9,900
Total Sakel	273,750	300	670,200
Irrigated American	16,530	22,114	49,400
Rain-grown American	64,150	9,748	69,530

SYRIA AND LEBANON.

The area harvested is 38,400 acres in the State of Syria against 37,300 in 1928, and 17,300 in the State of the Alaouites against 9,100 in 1928.

Weather conditions were normal.

(*International Institute of Agriculture.*)

WORLD'S COTTON ACRE-

COTONNIER—SUPERFICIE, PRODUCTION ET RENDEMENT PAR HA.

Table prepared by International

N.	PAYS COUNTRIES	SUPERFICIE—*Area* Moyenne *Average* 1909–10/1913–14	1925–26	1926–27	1927–28	1928–29
		hectares	hectares	hectares	hectares	hectares
	EUROPE					
1	Bulgarie	(1)(2) 1,023	2,941	3,014	5,152	4,870
2	Espagne	—	2,125	4,451	4,624	8,497
3	Grèce	(2)(3) 12,084	15,470	14,915	14,581	15,404
4	Italie	(4) 3,500	3,500	3,500	4,000	—
5	Malte	403	659	449	284	358
6	Royaume des Serbes-Croates-Slovènes	—	831	657	500	602
	Totaux	18,000	26,000	27,000	29,000	33,000
7	U.R.S.S.(6)	635,000	502,300	655,500	752,100	918,700
	AMÉRIQUE SEPTENTRIONALE ET CENTRALE					
8	Etats-Unis	13,820,811	18,637,180	19,055,638	16,243,447	18,340,049
9	Guadeloupe (7)	(8) 1,207	—	—	800	800
10	Guatemala	—	1,174	—	—	—
11	Haïti (7)	—	29,644	30,351	52,610	68,797
	Indes occidentales britanniques :					
12	Antigua	305	195	809	—	—
13	Barbade	1,658	1,488	1,427	150	—
14	Grenade (7)	(11) 1,299	1,620	1,620	1,620	—
15	Iles Vierges britanniques (7)	—	40	8	10	—
16	Jamaïque	51	19	18	3	—
17	Montserrat	859	1,012	1,133	1,174	1,052
18	St. Christophe et Nièves	1,825	890	1,594	1,101	—
19	St. Vincent	1,562	1,982	2,491	1,361	1,370
20	Indes occidentales néderlandaises (7)	(12) 145	—	—	—	—
21	Mexique	(12) 99,342	171,929	248,184	132,041	211,802
22	(**) Nicaragua (7)	—	—	—	—	—
23	Porto-Rico	(13) 345	4,654	4,047	2,000	—
24	(**) République Dominicaine (7)	—	—	—	—	—
25	(**) Salvador (7)	—	—	—	—	—
	Totaux	13,945,000	18,852,000	19,349,000	16,438,000	18,640,000
	AMÉRIQUE MÉRIDIONALE					
26	Argentine	2,091	110,058	71,746	85,000	—
27	Bolivie	—	2,300	2,500	—	-
28	Brésil	(14) 359,144	534,357	399,143	524,766	—
29	Colombie	(15) 4,620	20,000	36,000	16,000	-
30	Paraguay	(16) 80	12,152	9,597	—	
31	Pérou	(17) 66,117	120,000	127,863	127,852	—
32	(**) Vénézuéla	—	—	—	—	
	Totaux	433,000	799,000	647,000	770,000	750,000
	ASIE					
33	Ceylan	(14) 91	730	570	200	720
34	Chine (19)	—	1,904,640	1,428,000	—	—
35	Chypre	(21) 4,210	4,196	4,978	4,813	4,474
36	Corée	59,203	196,214	214,127	203,385	208,681
37	Etablissements français dans l'Inde	4	54	50	50	—
38	Indes britanniques	9,102,100	11,494,100	10,045,000	10,020,000	10,718,000
39	Indes néderlandaises (7)	—	11,000	9,000	5,500	8,530
	Indochine :					
40	Annam	—	6,800	5,000	5,600	3,700
41	Cambodge	—	5,279	5,123	6,726	—
42	Cochinchine	—	400	420	400	500
43	Laos	—	(23) 7,500	—	—	—
44	Tonkin	—	1,580	1,695	1,642	1,822

(**) Pays dont les chiffres ne sont pas compris dans les totaux.

(1) Donnée calculée pour le territoire compris entre les frontières actuelles. (2) Campagne 1914–15. (3) Non compris la Thrace orientale. (4) Donnée moyenne approximative. (5) Année 1924–25. (6) Les chiffres de 1925 à 1928 sont des chiffres révisés et ils se rapportent seulement aux exploitations individuelles des paysans ; pour les chiffres totaux et pour la comparabilité de tous les chiffres avec ceux de l'avant-guerre, voir notes à la fin du volume. (7) Exportation de coton égrené et de coton non égrené réduit en filasse. (8) Campagne 1911–12. (9) Estimation de la production. (10) Campagne 1913–14. (11) 1915–16 à 1918–19. (12) 1910–11 à 1913–14. (13) Campagne 1909–10. (14) 1911–12 à 1913–14 (15) Campagne 1915–16 (16) Campagne 1916–17. (17) 1914–15 à 1918–19. (18) 1911–12

AGE AND PRODUCTION

COTTON—AREA, PRODUCTION AND YIELD PER HA.

Istituie of Agriculture, Rome.

PRODUCTION DE COTON ÉGRENÉ — *Production of lint*					RENDEMENT PAR HECTARE *Yield per hectare*					
Moyenne *Average* 1909-10 1913-14	1925-26	1926-27	1927-28	1928-29	Moyenne *Average* 1909-10/1913-14	1925-26	1926-27	1927-28	1928-29	N.
quintaux *quintals*	quintaux *quintals*	quintaux *quintals*	quintaux *quintals*	quintaux *quintals*	quint. *quintals*	quint. *quintals*	quint *quintals*	quint. *quintals*	quint. *quintals*	
(1)(2) 1,081	4,483	5,007	7,196	9,418	(1)(2) 1,1	1,5	1,7	1,5	1,9	1
—	2,402	7,803	5,535	6,674	—	1,1	1,8	1,2	0,8	2
(2)(3) 33,098	31,675	38,504	27,256	32,252	(2)(3) 2,7	2,0	2,6	1,9	2,1	3
(4) 11,300	(5) 9,800	—	—	—	(4) 3,2	—	—	—	—	4
940	1,419	920	622	983	2,3	2,2	2,0	2,2	2,7	5
—	1,259	835	412	472	—	1,5	1,3	0,8	0,8	6
48,000	51,000	63,000	51,000	60,000	2,7	2,0	2,3	1,8	1,8	
1,962,000	1,695,000	1,078,000	2,155,000	2,672,000	3,1	2,0	2,6	2,9	2,9	7
28,258,194	34,915,514	38,078,003	28,090,904	31,390,765	2,0	1,9	2,0	1,7	1,7	8
—	408	285	(9) 900	--	-	-	-	1,1	—	9
(10) 313	3,577	—	—	--		3,0		—	—	10
20,095	49,945	40,009	44,273	-	-	-		--	—	11
533	95	340	528	-	1,8	0,5	0,4	—	—	12
2,208	1,345	868	39	-	1,4	0,9	0,6	0,3	—	13
1,523	1,605	1,924	1,305	--	-	1,0	1,2	0,8	—	14
176	4	1	2		—	—	—	—	--	15
144	—	—	—	-	2,8	—	--	—	—	16
1,125	1,283	2,723	3,032	2,724	1,7	1,3	2,4	2,6	2,6	17
2,920	1,415	1,582	1,610	-	1,6	1,6	1,0	1,5	—	18
2,225	2,656	2,301	1,489	1,197	1,4	1,3	0,9	1,1	0,9	19
(12) 349	36	43	—		(12) 2,4	—	—	—	—	20
(12) 436,980	434,670	780,165	388,623	582,456	(12) 4,4	2,5	3,1	2,9	2,8	21
640	204	370	—	--	—	—	—	—	—	22
(13) 858	4,100	(1) 2,978	(1) 2,082	-	(13) 2,5	0,9	—	—	—	23
(14) 2,521	1,388	898	592	105	—	—	—	—	—	24
—	5,336	497	—	—	—	—	—	—	--	25
28,720,000	35,417,000	39,823,000	28,538,000	32,040,000	2,1	1,9	2,1	1,7	1,7	
(12) 6,375	200,200	131,000	220,000		(12) 2,9	2,6	1,8	2,6	—	26
---	4,400	4,800	-		-	1,9	1,9	—	--	27
(14) 907,110	1,304,211	1,049,920	1,095,045	--	(11) 2,5	2,4	2,6	2,1	—	28
(15) 12,058	34,500	54,000	24,300	.	(15) 2,6	1,7	1,5	1,5	-	29
(17) 200	24,893	23,036	—		(16) 2,5	2,0	2,4	—	—	30
(18) 260,822	442,080	533,740	532,540			3,7	4,2	4,2	—	31
—	70,000	70,00	70,000	70,000		—	--	—	—	32
1,188,000	2,101,000	1,796,000	1,000,000	1,900,000	2,7	2,6	2,8	2,5	2,5	
—	220	474	337	—	--	0,3	0,8	1,7	—	33
(20) 4,825,150	4,579,000	3,434,000	4,300,000	3,300,000	--	2,4	2,4	—	—	34
4,301	5,541	7,801	3,828	3,895	---	1,3	1,6	0,8	0,9	35
41,980	267,151	309,388	288,886	324,964	0,7	1,4	1,4	1,4	1,6	36
1	274	200	225	202	—	5,1	4,0	4,5	—	37
7,770,000	11,276,000	9,115,000	10,819,000	10,229,000	0,9	1,0	0,9	1,1	1,0	38
(22) 39,553	11,858	9,515	11,925	9,240	—	—	—	—	—	39
—	6,800	3,000	3,000	4,500	—	1,0	0,6	0,5	0,8	40
—	5,068	3,688	5,184	—	—	1,0	0,7	0,8	—	41
—	420	435	480	609	—	1,0	1,0	1,2	1,2	42
—	—	—	1,170	1,370	—	—	—	—	—	43
—	—	—	—	—	—	—	—	—	—	44

(**) Countries for which figures are not included in the totals.

(1) Comprising the territory included within the present boundaries. (2) Season 1914-15. (3) Not including Eastern Thracia. (4) Approximate average. (5) Season 1924-25. (6) The figures for the years 1925 to 1928 have been revised and refer only to individual peasant holdings. (7) Exports of lint, including exports of unginned cotton reduced to terms of lint. (8) Season 1911-12. (9) Estimate of production. (10) Season 1913-14. (11) 1915-16 to 1918-19. (12) 1910-11 to 1913-14. (13) Season 1909-10. (14) 1911-12 to 1913-14. (15) Season 1915-16. (16) Season 1916-17. (17) 1914-15 to 1918-19. (18) 1911-12 and 1913-14. (19) Estimates made by the Chinese Cotton Millowners' Association. (20) 1916-17 to 1918-19. (21) Season 1918-19. (22) 1912-13 and 1913-14

WORLD'S COTTON ACRE-

COTONNIER—SUPERFICIE, PRODUCTION ET RENDEMENT PAR HA.

N.	PAYS COUNTRIES	SUPERFICIE — *Area*				
		Moyenne *Average* 1909–10/ 1913–14	1925–26	1926–27	1927–28	1928–29
		hectares	hectares	hectares	hectares	hectares
45	Irak	—	—	—	—	—
46	Japon	3,071	1,655	1,305	1,133	—
47	(**) Perse (1)	—	—	—	—	—
48	Siam	(2) 4,790	5,145	3,259	3,168	—
49	(**) Syrie et Liban	—	32,900	31,216	30,820	7,740
50	(**) Turquie d'Asie	(3) 182,467	158,678	110,022	90,424	—
	Totaux	10,923,000	13,644,000	11,730,000	12,158,000	12,460,000
	AFRIQUE					
51	(**) Afrique occidentale française (4)					
	Cote d'Ivoire (1)	—	—	—	—	—
	Dahomey	—	—	—	—	—
	Guinee franç	—	8,000	7,000	8,000	7,500
	Haute-Volta	—	—	—	115,122	—
	Senegal	—	30,000	—	10,000	23,000
	Soudan franç	—	—	—	41,200	—
	Territoire du Niger	—	—	7,170	5,048	—
52	Algerie	(2) 647	6,108	8,453	5,050	4,931
53	Angola	—	—	—	—	—
54	Congo belge (6)	—	9,000	9,500	10,000	—
55	Egypte	705,383	808,394	750,138	636,925	730,297
56	Erythrée	—	—	2,500	—	3,300
57	(**) Kenia (1)	—	—	—	—	—
58	Maroc français	—	700	1,200	400	400
59	(**) Mozamb. (8) :					
	Terr. de la Comp. de Mozamb.	—	11,887	7,528	7,932	—
	Terr. de la Prov. de Mozamb.	—	—	12,562	10,318	—
60	(**) Nigéria (9)	—	—	—	—	—
61	Nyassaland :					
	Culture des Europ. (Crops by Europ.)	(10) 12,431	7,098	5,406	1,030	423
	Culture des Indig. (Crops by Natives)	—	—	—	—	—
62	Ouganda	23,283	247,186	230,668	215,749	282,934
63	Rhodesie méridionale	—	26,744	3,202	542	1,023
64	Rhodesie septentrionale	—	4,795	170	69	—
65	Somalie italienne (11)	—	3,000	4,500	5,500	8,250
66	Soudan Anglo-Egyptien	17,703	77,406	90,966	96,569	115,111
67	Tanganyika	(10) 12,317	—	60,700	—	—
68	Togo (zone française) (1)	—	24,000	—	-	—
69	Union de l'Afrique du Sud (12)	97	44,923	28,080	21,855	21,300
	Totaux	783,000	1,307,000	1,229,000	1,085,000	1,280,000
	OCÉANIE					
70	Australie	150	7,610	6,060	—	—
71	Iles Fidji	—	140	—	—	—
72	Nouvelle Calédonie	—	—	400	350	—
73	Nouvelles-Hébrides (1)	—	—	—	—	—
	Totaux	2,000	15,000	12,000	21,000	20,000
	Totaux généraux :					
	non compris l'U.R.S.S.	26,104,000	34,643,000	32,994,000	30,301,000	33,183,000
	y compris l'U.R.S.S.	26,739,000	35,235,000	33,649,000	31,253,000	34,102,000

(**) Pays dont les chiffres ne sont pas compris dans les totaux.

(1) Exportation de coton égrené et de coton non égrené réduit en filasse. (2) 1911–12 à 1913–14. (3) Campagne 1910–11. (4) Les chiffres de la superficie comprennent aussi des terrains destinés en partie seulement à la culture du coton. (5) 1909–10, 1912–13 et 1913–14. (6) Les chiffres se rapportant aux superficies sont incompléts. (7) 1915–16 à 1918–19. (8) Culture des Européens seulement. (9) Quantités entrées dans le commerce ; la production totale est évaluée à environ 150,000–250,000 quintaux. (10) 1910–11 à 1913–14. (11) Cultures irriguées seulement. (12) Y compris le Swaziland. (13) 1910–11, 1911–12 et 1913–14.

AGE AND PRODUCTION

COTTON—AREA, PRODUCTION AND YIELD PER HA.

Production de coton égrené – *Production of lint*					Rendement par hectare *Yield per hectare*					
Moyenne *Average* 1909–10/ 1913–14	1925–26	1926–27	1927–28	1928–29	Moyenne *Average* 1909–10/ 1913–14	1925–26	1926–27	1927–28	1928–29	N.
quintaux *quintals*	quintaux *quintals*	quintaux *quintals*	quintaux *quintals*	quintaux *quintals*	quint *quintals*	quint *quintals*	quint. *quintals*	quint *quintals*	quint. *quintals*	
—	4,608	6,350	3,270	9,295	—	—	—	—	—	45
7,650	3,381	2,434	2,385	—	2,5	2,0	1,9	2,1	-	46
(2) 240,291	181,330	183,150	162,630	-	—	—	—	—	-	47
—	10,026	5,956	6,256	—	-	1,9	1,8	2,0	--	48
—	29,100	16,825	23,200	9,050	--	0,9	0,5	0,8	1,2	49
(3) 221,407	228,033	210,000	389,000	--	(3) 1,2	1,1	1,5	-	-	50
12,699,000	16,178,000	12,900,000	15,447,000	13,900,000	1,2	1,2	1,1	1,3	1,1	
--	13,690	14,020	11,832	--	—	—	-	—	—	
—	14,200	10,230	8,500		—	—	-	-	--	
—	4,850	5,020	5,000	1,000	--	0,6	0,7	0,6	0,5	
--	27,500	6,600	8,800	10,200	-	—	—	--	-	51
—	3,480	5,700	5,000	9,200	—	—	--	0,5	0,4	
—	13,150	3,800	8,500	—		—	—	—	—	
—	6,000	6,000	9,280	--	-	—	0,8	1,8	--	
(5) 2,971	12,106	16,570	8,859	13,365	(5) 8,6	2,0	2,0	1,8	2,7	52
—	5,979	8,188	4,362	4,319	—	--	—	—	-	53
—	35,000	48,870	59,750	—	—	—	—	—	-	54
3,149,782	3,578,356	3,437,976	2,734,852	3,525,568	4,5	4,4	4,6	4,3	4,8	55
--	4,000	6,000	3,000	4,000	—	—	2,4	—	1,2	56
(7) 408	3,712	2,235	1,179	—	—	—	—	—	—	57
—	900	1,600	800	700	—	1,3	1,3	2,0	1,7	58
—	4,835	6,055	4,331	—	—	0,4	0,8	0,5	-	59
—	—	19,860	27,610	--	—	—	1,6	2,7	-	
(10) 20,148	86,925	49,830	37,038	61,689	—	—	—	—	-	60
(10) 10,932	5,137	2,333	837	530	(10) 0,9	0,7	0,4	0,8	1,3	61
—	8,867	6,697	4,228	7,578	—	—	—	-	—	
44,095	328,144	239,002	251,263	355,340	2,1	1,3	1,0	1,2	1,.	62
—	11,187	1,000	156	645	--	0,4	0,3	0,3	0,6	63
—	808	174	95	--	--	0,2	1,0	1,4	—	64
—	5,500	6,000	8,300	15,250	—	1,8	1,3	1,5	1,8	65
31,342	230,826	281,049	230,743	307,334	1,8	3,0	3,1	2,5	2,7	66
(1)(10) 17,284	39,416	44,054	40,039	49,718	(10) 1,9	—	0,7	-	-	67
5,012	12,309	16,611		-	--	-	—	-	—	68
165	36,979	18,584	19,082	22,181	1,7	0,8	0,7	0,9	1,0	69
3,265,000	1,310,000	4,130,000	3,392,000	4,380,000	4,2	3,3	3,4	3,1	3,4	
163	12,342	9,608	18,626	13,608	1,0	1,6	1,0	—	-	70
—	216	1,459	641	—	—	1,5	—	—	—	71
—	450	1,000	600	—	—	—	2,5	1,7	—	72
(13) 1,187	8,284	5,090	5,598	—	—	—	—	—	—	73
2,000	21,000	17,000	25,000	20,000	1,0	1,4	1,4	1,2	1,0	
45,031,000	58,078,000	58,720,000	49,353,000	52,300,000	1,8	1,7	1,8	1,6	1,6	
47,893,000	59,773,000	60,407,000	51,508,000	54,972,000	1,8	1,7	1,8	1,6	1,6	

(**) Countries for which the figures are not included in the totals.

(1) Exports of lint including the exports of unginned cotton reduced to terms of lint. (2) 1911–12 to 1913–14. (3) Season 1910–11. (4) The figures for the area also comprise land only partly devoted to the growing of cotton. (5) 1909–10, 1912–13 and 1913–14. (6) Figures for areas are incomplete. (7) 1915–16 to 1918–19. (8) Cultivation by Europeans only. (9) Quantity marketed; the total production is estimated at from 150,000 to 250,000 quintals. (10) 1910–11 to 1913–14. (11) Irrigated crops only. (12) Including Swaziland. (13) 1910–11, 1911–12 and 1913–14.

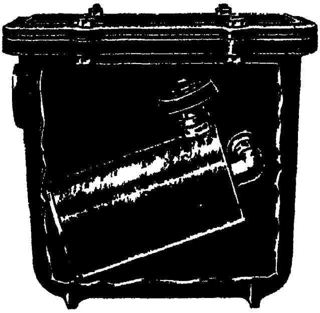
TURKEY.

Cotton production in the Smyrna district for this season is estimated to be about 45,000 bales, which is approximately 50 per cent. greater than the production last year, according to local growers.

(Foreign Crops and Markets.)

UGANDA

It is estimated that 684,000 acres were planted to cotton in Uganda this season, according to a cable received by the Foreign Service of the Bureau of Agricultural Economics from the International Institute of Agriculture at Rome. This is a decrease of 14,000 acres under last year's acreage of 698,000, which was the largest ever planted, and compares with 171,000 in 1921-22. Production in 1928-29 totalled 164,000 bales.



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Preliminary Estimate, U.S. Crop.

The Crop Reporting Board of the United States Department of Agriculture published on December 9 the following estimate, based on reports and data furnished by crop correspondents, field statisticians, co-operating State Boards (or Departments) of Agriculture and Agricultural Colleges:—

		Est. Production *(Bales of 500 lbs. Gross weight) (In 1,000's)		Area Harvested 1929, Acres (in 1000's)	Area in Cultivation, July 1, 1929. Acres (in 1000's) Revised	Area Picked 1928. Acres (in 1000's)	Harvested Yield, (in lbs.)*		Final Census Ginnings (Bales of 500 lbs. Gross weight) (in 1000's) 1928
		1st Dec., 1929	Last Month				Per acre Estimate, 1st Dec., 1929	indicated 1928	
Virginia	..	46	44	88	89	79	250	265	44
N. Carolina	..	735	760	1,782	1,818	1,860	197	215	836
S. Carolina	..	845	850	2,183	2,228	2,361	105	147	726
Georgia	..	1,345	1,340	3,782	3,847	3,728	170	132	1,030
Florida	..	29	30	95	97	95	145	97	19
Missouri	..	215	210	343	350	334	300	210	147
Tennessee	..	515	510	1,120	1,137	1,107	220	185	428
Alabama	..	1,335	1,335	3,589	3,633	3,534	178	150	1,109
Mississippi	..	1,915	1,950	4,071	4,133	4,029	225	175	1,475
Louisiana	..	810	830	2,050	2,079	1,990	189	166	691
Texas ..	..	3,950	3,950	17,872	18,912	17,743	106	138	5,106
Oklahoma	..	1,200	1,225	4,492	4,655	4,243	128	136	1,205
Arkansas	..	1,490	1,490	3,834	3,900	3,681	186	162	1,246
New Mexico	..	84	86	130	132	117	309	360	88
Arizona	..	156	157	226	227	200	330	357	149
California	..	242	232	309	317	218	375	378	172
All others	..	7	10	15	15	22	223	152	7
U.S. Total	..	14,919	15,009	45,981	47,569	45,341	155·3	152·9	14,478
Lower California (Old Mexico)†		—	75	—	—	160	—	239	80

Area abandoned, 3·3 per cent.

* Not including production of linters, which is usually about 6 per cent. as much as the lint, Allowances made for cross-State ginnings.

† Data for Lower California (Old Mexico) are not included in California figures nor in United States total.

The report was issued without comment, but later in the day W. F. Callander, head of the plant reporting board, in a radio speech, said the decline in the December estimate of 90,000 bales from the estimate issued on November 1 may be blamed upon the unseasonable weather for the maturing of the tail end of the crop and for picking it.

Rainfall, he said, was greater than usual in many portions of the cotton belt and some sections even had snowfall, an unusual thing in November.

GINNING REPORT, DECEMBER.

The Census Bureau, on the 20th December, issued the ginning report as per 12th December, and showed a total of 13,462,000 bales of this year's cotton crop ginned up to the close of business on December 12. This total compares with 13,144,000 bales last year, 12,073,000 bales in 1927, and 15,541,000 bales in 1926. The amount ginned since November 30, when the last report was made up, is 604,000 bales, against 584,000 bales in the same period last year, 335,000 bales two years ago, and 897,000 bales three years ago.

	1929	1928	1927	1926
Alabama	1,237,000	1,058,570	1,163,156	1,414,208
Arizona	118,000	106,308	68,700	82,516
Arkansas	1,288,000	1,073,862	889,821	1,321,363
California	203,000	130,616	68,343	98,906
Florida	30,000	19,646	17,148	32,094
Georgia	1,227,000	1,008,912	1,094,787	1,366,191
Louisiana	788,000	675,262	535,674	772,013
Mississippi	1,746,000	1,392,462	1,311,384	1,647,182
Missouri	172,000	106,530	86,288	179,231
New Mexico	74,000	63,982	60,564	53,092
North Carolina	657,000	800,102	824,442	1,082,646
Oklahoma	1,547,000	1,045,376	912,772	1,292,575
South Carolina	750,000	711,786	716,780	901,816
Tennessee	420,000	358,345	318,914	387,468
Texas	3,659,000	4,549,001	3,972,633	4,857,311
Virginia	40,000	39,999	26,685	41,879
Other States	6,000	3,574	4,672	10,314
Total	13,462,000	13,144,333	12,072,763	15,540,804

The above total of 13,462,000 includes 520,000 round bales and 21,000 bales of American-Egyptian, against 559,000 round bales and 22,000 bales of American-Egyptian a year ago.

Grade and Staple Report.

The following is a summary of the report of the Bureau of Agricultural Economics made in co-operation with State Agricultural Experiment Stations, on the grade, staple length and tenderability of cotton ginned in the United States prior to November 1, 1929 (estimated from data obtained from the classification of samples representing American upland and American

Egyptian cotton; according to the official Cotton Standard of the United States):—

SUMMARY

	1929 Bales	1929 Per cent.	1928 Bales	1928 Per cent.
Total crop (as reported by the Bureau of the Census)	10,893,200	100·0	10,162,500	100·0
Total American upland	10,882,400	99·9	10,149,100	99·9
Total American Egyptian	10,800	*	13,400	0·1
Grades (American upland):				
White, middling and better	8,204,900	75·4	8,294,400	81·7
White, strict low and low middling	1,451,000	13·3	813,800	8·0
White, below low middling	39,500	0·4	40,200	0·4
Spotted and yellow tinged	969,500	8·9	779,400	7·7
Light yellow stained, yellow stained, grey, blue stained	4,200	*	3,900	*
Tenderability on Section 5 futures contracts (American upland):				
Total tenderable	8,598,000	79·1	8,646,900	85·2
Tenderable $\frac{7}{8}$ in. to 1 $\frac{1}{32}$ in., inc.	7,356,500	87·7	7,687,500	75·7
Tenderable over 1 $\frac{1}{32}$ in.	1,241,500	11·4	959,400	9·5
Total untenderable	2,284,400	20·9	1,502,200	14·8
Untenderable in grade	63,600	0·5	49,800	0·5
Untenderable in staple	2,165,600	19·9	1,422,500	14·0
Untenderable in both grade and staple	55,200	0·5	29,900	0·3

STAPLE

(American upland)	1929 Bales	1929 Per cent.
Under $\frac{7}{8}$ in.	2,220,800	20·4
$\frac{7}{8}$ in. and $\frac{29}{32}$	4,063,700	37·3
$\frac{15}{16}$ in. and $\frac{31}{32}$ in.	2,092,700	19·2
1 in. and 1 $\frac{1}{32}$ in.	1,261,400	11·6
1 $\frac{1}{16}$ in. and 1 $\frac{3}{32}$ in.	663,600	6·1
1$\frac{1}{8}$ in. and longer	580,200	5·3

* Less than one-tenth of one per cent.

DETAILS

Designation	Bales (*b*)	Per cent. (*c*)	Designation	Bales (*b*)	Per cent. (*c*)
Upland total	10,882,400	100·0	Yellow tinged	32,800	0·3
Extra white	212,300	1·9	2—S.G M.	100	*d*
3—G.M.	135,800	1·2	3—G.M.	2,100	*d*
4—S.M.	60,800	0·6	4—S.M.	14,700	0·1
5—M.	12,400	0·1	5—M.*	12,200	0·1
6—S.L.M.	3,000	*d*	6—S.L.M.*	3,200	*d*
7—L.M.	300	*d*	7—L.M.*	500	*d*
White	9,695,400	89·1	Lt. yel. stained	1,700	*d*
1—M.F.	200	*d*	3—G.M.	—	—
2—S.G.M.(*f*)	37,700	0·3	4—S.M.*	600	*d*
3—G.M.	841,600	7·7	5—M.*	1,100	*d*
4—S.M.	3,620,000	33·3	Yellow stained	600	*d*
5—M.	3,705,400	34·1	3—G.M.	—	—
6—S.L.M.	1,204,800	11·1	4—S.M.*	300	*d*
7—L.M.	246,200	2·3	5—M.*	300	*d*
8—S.G.O.	33,400	0·3	Grey	1,800	*d*
9—G.O.*	6,100	*d*	3—G.M.	100	*d*
Spotted	936,700	8·6	4—S.M.	1,500	*d*
3—G.M.	42,800	0·4	5—M.*	200	*d*
4—S.M.	511,500	4·7	Blue stained	100	*d*
5—M.	322,600	3·0	3—G.M.	100	*d*
6—S.L.M.*	54,200	0·5	4—S.M.*	—	—
7—L.M.*	5,600	*d*	No. grade*(*e*)	1,000	*d*

(*b*) Revised figures of Bureau of Census to nearest hundred bales.
(*c*) To nearest one-tenth of one per cent.
(*d*) Less than one-tenth of one per cent.
(*e*) Includes all bales not otherwise classified above.
(*f*) Includes extra white above good middling.
* Untenderable.

A perusal of these tables will show the reader that a much larger proportion of this season's crop, as compared with last season, is untenderable. This season's untenderable cotton amounts to 20.9 per cent., as against 14.8 per cent. last season, for the cotton ginned to November 1. The staple is also shorter this year than last, for up to November 1 2,200,800 (20.4 per cent.) bales of under ⅞ in. had been ginned, as against only 1,452,200 (14.29 per cent.) last season.

Messrs. Bond, McEnany & Co., New York, write on this subject, as per 20th December last, as follows: —

> Even more important is the much greater decrease in the supply of tenderable cotton and particularly of cotton having a staple of ⅞-inch or more. The last grade and staple report of the Department of Agriculture showed that even as early as November 1 no less than 20.9 per cent. of the season's total ginnings—i.e., 2,284,400 bales—were untenderable for all causes, while 19.9 per cent.—i.e., 2,165,600 bales—were untenderable because having less than ⅞-inch staple. These figures all show very large increases over the corresponding figures for 1928-1929, the quantity of cotton untenderable by reason of deficient staple jumping no less than 743,100 bales. Nor is it conceivable that the situation has improved since November 1, inasmuch as the part of the crop remaining in the fields on that date has been subjected to the most adverse weather conditions and can scarcely have failed to deteriorate seriously both in grade and in staple quality. In any event, if the percentages of untenderability shown by the ginnings to November 1 are simply maintained to the end of the ginning season, the present crop will contain about 3,000,000 bales of untenderable cotton, of which not far from 2,800,000 bales will have less than ⅞-inch staple. So far as we know, nothing like this has ever before been experienced, and its bearing upon the long-run supply and price situation of American cotton is self-evident.

The grade and staple report as per November 30th last was issued recently. Although the complete report has not yet been received, we are able to give below a résumé of its main contents.

The report states that of the 12,858,000 bales ginned up to the end of November, no less than 2,801,000 or 21.8 per cent. were untenderable as regards grade or staple or both. Comparison with last season shows that up to the end of November of 12,560,000 bales ginned only 14.6 per cent. were untenderable. The cold rainy weather during November has had its effect on these figures, for 26.3 per cent. of the cotton ginned in this month was untenderable, as against last year only 13.7 per cent.

It should also be remembered that December was a very poor month for cotton picking, due to rain, snow and frosts, and a larger percentage still of this cotton will also be found untenderable when the next grade and staple report is issued.

Senate Investigation of Cotton Exchanges.

Still another investigation into the causes of the low price of cotton is being conducted by the Sub-committee of the Senate Committee on Agriculture.

The resolution under which the investigation was conducted carried the intimation that low prices were the result of numerous

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factors, including undue speculation, the overshadowing importance of certain interests in the trade, the influence of the Cotton Textile Institute on the attitude of spinners in the purchase of their raw material, and inequalities in the present contract system in America. Furthermore, questions asked by spokesmen for the investigators have centred largely around the foregoing.

The President of New Orleans Cotton Exchange, Mr. J. P. Henican, refuted the charge that low prices were due to speculation; in fact, he explained that lack of speculation, coinciding with the dumping of the American crop on the market, was the cause of the low price levels reached this season.

Mr. Gardiner H. Miller, President of the New York Cotton Exchange, declared that the price of American cotton has been depressed this autumn primarily as a result of the large world production, particularly of foreign cottons, combined with the rapid marketing of the domestic crop at a time when the spinning industry was depressed, and economic conditions were forcing a decline in commodity prices in general. He pointed out that foreign crops this year promised to total 11,200,000, compared with a ten-year average of 9,070,000. He also stressed the fact that the October commodity index number of the Bureau of Labour Statistics was only 96.3, compared with a ten-year average of 108.3, and said that this had much to do with the decline. He also pointed out that competing varieties of American cotton are and have been during most of the year about 1¾ cents above the normal or usual relationship with Indian. He declared that if the exchanges had not made it possible this fall for merchants to buy cotton freely, notwithstanding limited forward sales to spinners, there would have been a panic in the spot cotton markets of the South.

Questioning Mr. Miller, Senator Smith (of South Carolina) said it was probable that 15,000,000 bales of American Cotton would be consumed this year and that the crop is therefore inadequate. He said:

"I know that if there had not been some influence, somewhere, holding in its power the ability to adjust the price of cotton they would not have been able to hold cotton from going 3 cents or more per pound higher. Some influence has kept the wise men from buying cotton."

Answering a statement by Senator Heflin that a certain firm of exporters represented an "overshadowing influence" on the market, Mr. Miller said that one or two or half a dozen firms handle a larger percentage of the crop than formerly, smaller firms having been unable to make money because of lack of capital. He said no agency other than supply and demand could affect the price of cotton for more than a limited time.

Mr. Butler expressed some vigorous opinions upon the question of Southern delivery. He said that the present plan of Southern delivery on New York contracts has been detrimental to speculation and that the contract with multiple Southern delivery points is fundamentally a bear contract. He said that New York and Norfolk should be eliminated as points of delivery—the latter because it is too close to New York for the 35-point differential to have the effect intended. Under such conditions, he said, any manipulator at any time can put a stock in New York at a cost of $1.00 a bale.

Senator Smith likewise criticized the Southern delivery contract, asking Mr. Miller if he did not think it created such uncertainty as to deter buying and depress the market.

Mr. Clayton's testimony bore out the seriousness of foreign competition with American cotton. He said that the United States now produces only about 50 per cent. of the tenderable world's crop, while 50 years ago it produced 75 per cent. of the total. In short, the declining quality of cotton produced in the United States does not entitle it to command the relatively high prices it has brought heretofore, and the latter are being gradually readjusted to levels more in keeping with those paid for foreign growths. He pointed out that more than 20 per cent of the crop produced in the United States in 1929 was shorter than ⅞ in., whereas a few years ago such staple was practically unknown, while the staple of the Indian Crop has been improving, so that very little of the old cotton of less than ½ in. is now produced there. Of Russia Mr. Clayton said:

"This year Russia raised 1,500,000 bales of cotton, and the Russian Government is committed to a production programme, which will make purchases of American cotton unnecessary in the next two years, and within five years will give them a substantial export surplus. An estimated crop of approximately 2,000,000 bales is to be planted next year."

He criticized the effect of the tariff in America in raising the cost of production, which is forcing the Southern farmer to a constantly lower standard of living. He said the cotton farmer must get 22 cents a pound if he is to maintain his pre-war standard of living. Mr. Clayton said that one of the fundamental reasons for the price depression was the record movement of the crop, as unorganized farmers poured their production on the market. He also gave fundamental financial and economic conditions as a cause. He supported the opinions of the presidents of the exchanges as to the value of the service these institutions had rendered this fall, and estimated that as of December 1 speculators were carrying 4,000,000 to 5,000,000 bales of American cotton which otherwise would have been dumped upon spinners to carry.

Mr. Clayton told the sub-committee that in his opinion the price of cotton would more likely rise than fall after the first of the year. However, unless there was some change for the better in business conditions he thought it likely the price would remain where it was.

Mr. Clayton denied that his company had had any overshadowing influence on the market. "My company has never speculated, has never sold short sales of cotton and has had no motive to break the price of cotton," Mr. Clayton said. He stated his company had advanced $4,000,000 during spring of 1929 to the cotton farmer.

At the adjourned hearing Mr. Clayton was again the chief witness, and said he believes the New York Cotton Exchange soon will take action voluntarily to abolish its differentials with New Orleans and that this automatically would cause deliveries at New

York on futures contracts to cease, so he did not feel there was any necessity of a law reforming the new Southern delivery contract. He does not feel call sales are injurious, he said. Senator Smith disagreed with him rather sharply on this question.

Senator Ransdell asked the witness what could be done by Congress to enable the producers to get better prices for their cotton. Mr. Clayton replied that the only alternative to the tariff which the cotton producers have to pay for imported commodities would be to give them a bonus on their exports. He added that if the tariff burden was taken off the cotton producers they would probably be in a better position to compete with the foreign producers.

Senator Walcott, of Connecticut, sought from the witness his views on the probable trend in the future buying and selling of cotton, asserting that in the future there will probably be some combination of buyers that will purchase the cotton for the spinners of the United States, and pointing out that combinations have been formed in Europe. Mr. Clayton said that he could not see the formation of any such group in the immediate future, because the spinners of the United States are so isolated. He said that it probably will be done many years hence, but he could not see that it is probable within the next few years.

Mr. Clayton was emphatic in saying he did not believe an increase in the loan basis on cotton by the Federal Farm Board would be beneficial in the long run. To raise the loan basis to 20 cents a pound he feared would result in increasing production next season by encouraging larger acreage.

The sub-committee reconvenes in January and other witnesses are to be called.

HUMIDITY IN U.S. COTTON—STUDY OF STATE COTTONS.

Spinners interested in the recent tests for humidity in Egyptian cotton will appreciate the following study of the moisture content of North Carolina cottons, which has been made by the Textile School of the North Carolina State College, Raleigh, N.C. Mr. Hilton, Associate Professor of Yarn Manufacture, and Mr. Thomas Nelson, Dean of Textiles, who carried out this investigation, describe the tests and results as follows:—

From four different sections of the eastern part of the State 190 samples of cotton were shipped to the textile school. The samples were pulled from the bales and placed in sealed jars. Twenty-four samples were received from the warehouses of the North Carolina Cotton Growers' Co-operative Association at Dunn, Fayetteville and Laurinburg. The Raleigh warehouse of the same association sent 118 samples.

The annual rainfall and precipitation for the year of 1928 was in excess of normal in the eastern section of North Carolina. All the samples were picked during September and October.

The samples were weighed before being placed in the oven and again after a period of three hours, during which time they were being dried at a temperature from 200° to 240° F. After the three-hour period weighings were taken each 30 minutes until three weighings recorded the same.

The rule to find percentage of regain The weight of the bone-dry sample (*B*) subtracted from the weight of sample as received (*W*), multiplied by 100 and divided by the bone-dry weight

$$\frac{(W-B) \times 100}{B} = \text{per cent regain}$$

The total average per cent regain was found to be 8·25 (¾-in cut and mixed staple not considered) The 1⅛-in staple samples contained the highest average moisture content, and the 1-in staple samples the lowest amount The maximum amount of moisture per bale as by staple was in the 1 1/16 in samples, and the minimum amount per bale as by staple was in the 15/16-in samples

Strict middling, bright-grade samples contained the highest average amount of moisture, and the middling, spotted-grade contained the lowest amount —*Textile World*

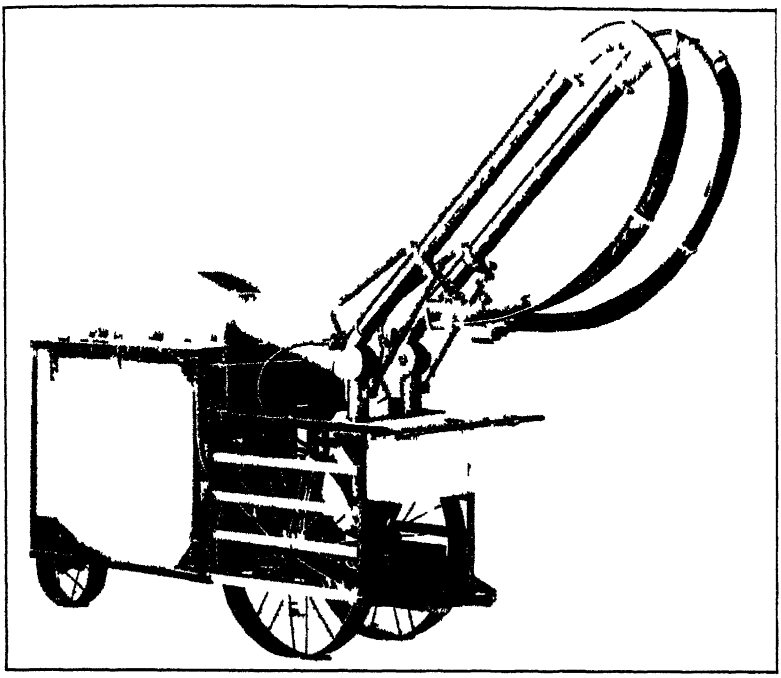
WOOL COTTON.

Still another short staple cotton seed has made its appearance in U S A It is reported in the American press that a South Carolina farmer was sent 12 seeds of "wool cotton" from Mexico From these 12 seeds he has just gathered 12 lbs of seed cotton, and while his section and all his other cotton patches were heavily infested with boll-weevil, not a weevil was found in the Mexican seed patch The plants grow about the height and size of ordinary cotton, the main difference being that their branches are forked and contain but few leaves The staple resembles wool, and is about ¾ in in length The farmer is wondering if this variety is immune to boll-weevil, at any rate, he has realized enough seed to plant an acre next spring and make a thorough test of it

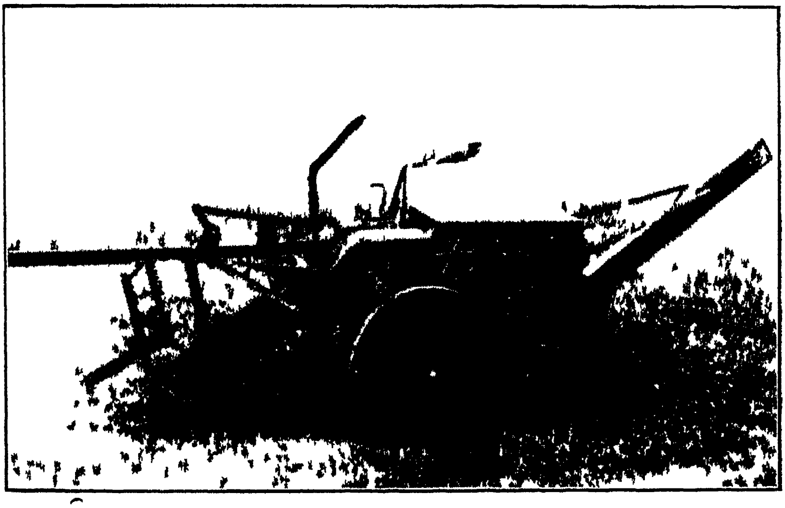
MECHANICAL COTTON PICKERS AND HARVESTERS.

Two new mechanical cotton pickers have made their appearance in the cotton fields of the United States this season

The *Durant Cotton Picker*, made by the manufacturers of the Durant motor car, is a small light machine 2 ft wide and 5½ ft long, weighing about 300 lbs It carries a bag to hold 100 lbs of seed cotton and is pushed between the cotton rows by the two men operating the two nozzles The nozzle is simply held against the boll to be picked, each picker-head contains a pair of revolving aluminium rollers which pick the cotton from the boll, just as any hand picker would do, and passes the picked seed cotton to a flexible tube through which a current of air draws the boll to the sack Before being deposited in the sack the boll is thrown against a metal screen which separates dirt and sand from the cotton The makers claim that the current of air also removes moisture from the lint, and for this reason the cotton picker may be used when dew is still on the plants, when hand picking should not be carried on A small single cylinder petrol engine of about 1 H P revolves the fan which creates the current of air, this engine consumes approximately one gallon of petrol in a day



Durant Cotton Picker



One-Row Cotton Harvester

Made by General Cotton Harvester Co , Fort Worth, Texas

The manufacturers claim that the machine picks the cotton more cleanly than by hand, and that consequently the grade is improved During tests carried out at Corpus Christi, hand-picked cotton graded strict middling, moreover, the colour was improved The actual saving in the cost of picking and the increase in the selling price of the better graded cotton amounted to $10 20 per bale

The Co-operative Farmers' Associations are said to be interested in this machine

The writer considers that one drawback the machine has at present is that it fluffs out the bolls and in many cases separates the different locks According to a gin manufacturer, these separate locks will cause the lint to be gin-cut when it passes through the gins This statement was supported by the samples of hand-picked and machine-picked ginned cotton shown by the manufacturer of the picker Although the machine-picked cotton was much cleaner than the hand-picked cotton the former was very roughly ginned and full of nepps, whereas the hand-picked cotton, picked on the same day, was smoothly ginned cotton

The *Smith Conrad "Combine"* cotton harvester manufactured by the General Cotton Harvester Co , Fort Worth, Texas, is a cotton stripper, cleaner and huller combined The single row machine will harvest 5 to 7 acres a day, while a two row machine is able to harvest double that capacity Compared with hand picking it is said the machine is capable of doing the work of 10 men

As will be seen from the illustration the machine has the appearance of a "sled", it is a sled, but the open cotton is picked separately and deposited in one receptacle, while the "bollies" pass on to the hull extractor which separates the lint from the hulls By this means the "bollies" are kept separate from the mature fibre It is intended to pass this machine through the fields after the first pickings have been taken off

Huge Cotton Selling Agency.

The heads of the cotton co-operative associations after a two days conference with members of the Federal Farm Board at Memphis during December approved the central sales agency plan, submitted by the Board, calling for a corporation capitalized at $30,000,000 to be formed with the American Cotton Growers' Association as the basic organization It is said that the proposed corporation will be the largest co-operative organization in the world

This corporation represents the American effort to obtain more remunerative prices to the cotton planter, and there is no doubt that it will be able to influence the course of the markets next season It is to be hoped that this result will be obtained by educational means The American planter should be shown the folly of planting short staple seed, and should be taught how to obtain an increased yield per acre from his land, otherwise he will not be in the position to compete with outside growths If high prices are obtained simply by means of a lessened production, cotton growers

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in other parts of the world will have a greater incentive to produce more and will benefit financially and commercially by America's reduced crops.

The corporation will be empowered to provide central marketing facilities and sales services, to buy cotton from its own stockholders and from outsiders in so far as this is permitted by Federal law, to deal in cotton seed and manufacture or deal in cotton products, to lease, buy or construct warehouses and gins where such facilities cannot be reasonably provided by the local associations, conduct educational work for diversification and adjustment of acreage, conduct research and statistical services, and develop and establish a centralized finance system for marketing cotton throughout the belt.

Two separate marketing branches will be set up for short and long staple cotton and the entire belt is divided for convenience into four grand divisions: the South-East, including North Carolina, South Carolina, Georgia and Alabama; Mississippi Valley, including Mississippi, Louisiana, Arkansas, Missouri and Tennessee; South-West, to take in Oklahoma and Texas, exclusive of the irrigated portion of Texas; and the Far West, to include West Texas, New Mexico, Arizona and California.

Stock will be sold to *bona-fide* farmers. Loans secured by notes will be made by the Government over long terms, probably 25 years. The corporations plan an immediate and extensive campaign for membership among cotton growers.

The first annual meeting of the new corporation must be held before July 1, 1930. In a formal statement issued at the close of the meeting, Alexander Legge, head of the Federal Farm Board, said the organization would be in full operation by that time and would be in a position to handle the 1930 crop.

The sub-committee has been authorized to prepare the charter and by-laws subject to the approval of the general organization committee and the Farm Board. The members of the sub-committee are:—

S. L. Morley, Oklahoma Cotton Growers' Assn., Oklahoma City, Okla.
Harry Williams, Texas Farm Bureau Cotton Assn., Dallas, Tex.
N. C. Williamson, Louisiana Farm Bureau Cotton Growers' Co-operative Assn., New Orleans, La.
Allen Northington, Alabama Farm Bureau Cotton Assn., Montgomery, Ala.
U. B. Blalock, North Carolina Cotton Growers' Co-operative Assn., Raleigh, N.C.
A. H. Stone, Staple Cotton Co-operative Assn., Greenwood, Miss.

THE FEDERAL FARM BOARD

Mr. T. A. Carter, of Messrs. James E. Bennet & Co., of Chicago, writing in the *Cotton Digest* on the Brazilian Government's experiences in coffee prices control, the Stevenson rubber scheme, and the Cuban attempt to raise sugar prices, continues as follows on the Federal Farm Board

The Farm Bureau disclaims any intention of price fixing, but it is establishing corporations for the purpose of handling farm products, especially cotton and wheat, and creating facilities for loaning money in immense quantities to producers at valuations very close to prevailing market quotations; and it has expressed its intention to continue loaning at fixed limits, even should market prices drop below its loan limits. Inasmuch as many producers would be unable to pay their loans should prices stay below the limits fixed by the Government, this action results in direct price fixation on at least a part of the crop grown in this country.

In our opinion, this experiment in business, indirectly undertaken by the Government, will eventually fail, and most of the money derived from the tax-paying public will be wasted to no purpose, except to again make clear the truth of the well-proven economic fact that prices for commodities are controlled, in the long run, by supply and demand.

CONSUMPTION ESTIMATE FOR 1929-30.

Mr. F. W. Tattersall estimates the consumption of American cotton for the current season at 14,600,000 bales, against 15,076,000 bales, according to the returns of the International Federation for 1928-9.

The details of the consumption figures for last season with his estimate for 1929-30 are given in the following table:—

	International Federation Consumption 1928-9.	Estimated Consumption 1929-30.
	(Bales in 1,000's.)	
United States	6,788	6,450
England	1,910	1,850
Rest of Europe	4,614	4,600
Asia	1,431	1,400
Minor Countries	333	300
	15,076	14,600

If the American crop for 1929-30 is taken as 14,900,000 bales, with a carry-over from last season of 4,400,000 bales, the available supplies will be about 19,300,000 bales. With a consumption of 14,600,000 bales there is a probability of a carry-over at the end of next July of 4,700,000 bales, or an increase of 300,000 bales compared with a year earlier.

WORLD'S ESTIMATED CONSUMPTION LESS.

The *New York Cotton Exchange Service* state that they estimate world consumption of American cotton during November, subject to slight revision, at 1,164,000 bales, against 1,349,000 in October, 1,339,000 in November last year, and 1,419,000 in November two years ago. During the four months from August 1 to November 30, constituting the first third of the season, total consumption of

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American was approximately 4,857,000 bales, against 5,083,000 in the same period last season, and 5,684,000 two seasons ago. Present indications are that the world consumption total for December will be materially less than that for December a year ago, thus increasing the minus difference between the total for the season to the end of December this year and the total for the same period last year and that for the year before last.

VALUE OF 1929 CROP.

The *U.S. Bureau of Agricultural Economics* state that the average price being paid producers for cotton lint on December 1, 1929, was 16.4 cents per lb., compared with 18.0 cents per lb. on December 1, 1928. Applying these prices to the 1929 production of 14,919,000 bales, as estimated by the Department on December 9, and to the final 1928 estimate of 14,478,000 bales, the indicated farm value of the 1929 crop is $1,225,032,000 and of the 1928 crop $1,301,796,000. On the above basis the farm value of the Texas crop this year is about $131,000,000 or 29 per cent. below the value of the 1928 crop computed on the same basis. Oklahoma and North Carolina are the only other major States showing declines in total value. Georgia and Mississippi show the greatest increases, with 13 per cent. and 21 per cent. respectively. Applying December 1 prices to the estimated production of seed of 6,630,000 tons in 1929, and 6,435,000 tons in 1928, the farm value of the 1929 seed is $201,096,000, and of the 1928 seed $233,447,000.

Marketing of Cotton.

Dr. C. B. Warner, Chairman of the Joint Relations Committee of the American Cotton Association, in an article in a recent issue of the *Manufacturers' Record*, describes a plan for improving the marketing of cotton and cotton textiles. We extract the following from his article:—

There have grown up in this country recently gigantic combinations, and nearly every commodity is involved. At first the Government took a harsh view of the situation, but it was soon discovered that in many industries some relief must be had from unwise competition if the industry was to survive. Now that the farmer often produces the raw material used by these combinations. he should be included. For example, the textile industry has never been reorganized and is in a bad way, with Oriental cheap labour producing silk at the top and the cotton planter being crushed at the bottom. It is time that a conference of leaders be held, with each unit of the textile industry represented.

A Textile Combination.—There have been so many industrial combinations in the past that experience teaches us that a unified textile industry is easily within the bounds of possibility. If a conference of textile leaders were held, and tariffs and sales taxes were recommended, then, through orderly arrangement, each unit could be protected in such a way that a fair profit would accrue to each. The price of the commodities produced by each unit could be stabilized, and instability, irregularity and speculation would belong to the past.

as soon as the entire textile group has been reorganized and the spinner knows he will receive a higher price for his fabric, due to elimination of the wastes of competition, and to an adequate tariff, he is in position to agree with the planter on a set price for cotton. The cotton manufacturers and the cotton farm co operative are then in a position to appoint a joint holding committee to buy all the cotton produced in this country, sell the surplus abroad and retain the balance for domestic use. The price of raw cotton, being determined by the conference of textile leaders, will be a figure that will pay a fair remuneration to the farmer for capital and labour and, selling direct to the spinner, speculative waste and middlemen's profit will be eliminated. After the cotton is ginned there will be one man at the warehouse to grade it, and, as this man is appointed by the joint committee fairness in grading may be expected. The planter will then receive receipts for his graded cotton and each month for ten months he will receive a cheque from the holding committee. Each cheque will represent in value one-tenth of the entire value of his cotton. If he needs money faster, he can dispose of the cheques at the local bank for nearly the value of the cotton, since there is no speculation involved.

The Closed Market.—In the spinners' association and in the cotton farm co operative it is likely that membership will approach 100 per cent of those eligible. The financial, industrial, farming and Government interests are all in favour of stabilization, and the pressure against outlaws will be tremendous. As in every large combination, we may expect a few on the outside, but experience teaches us that their influence is limited. With the solid membership behind it, the spinners' association will contract to buy from the holding committee cotton at the set price, and will also agree not to buy cotton from anyone else. This will make a closed domestic market for cotton, and it will practically force every grower into his co-operative, for he will have no market unless he is content to ship abroad at a lower price.

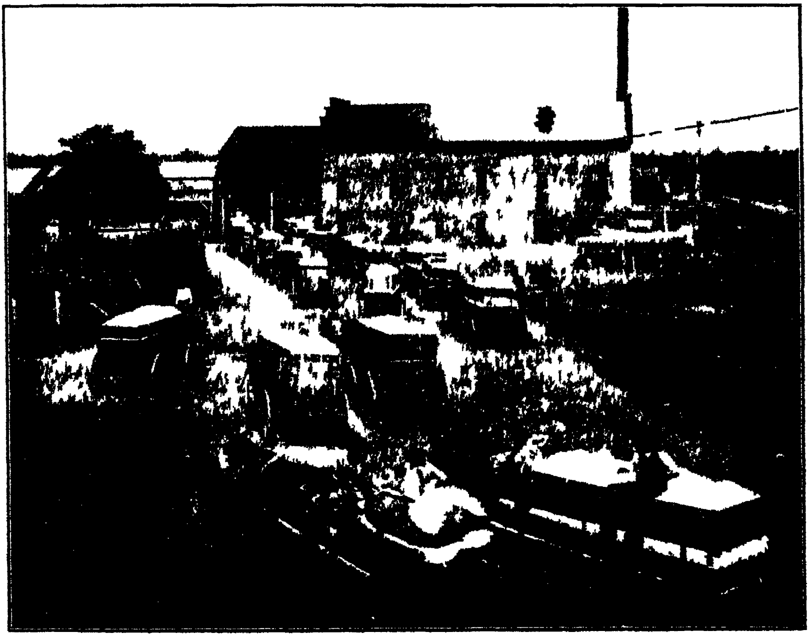
Controlling the Surplus.—No plan of marketing can succeed unless the surplus can be controlled. This can be done by dumping the surplus or cutting down production and, to accomplish this well, both methods should be employed. Factories find it much easier to curtail production than does the farm, and hence, of late, industry carries greater gains than farming. The plans that now, it is hoped, will curtail production in farm products are financial pressure from banks and Government agencies, public opinion, and voluntary reduction of acreage. In addition, this plan proposes that a more powerful instrument lies in the last principle—the closed contract. When the cotton planter applies for admission to his co operative association, he agrees not only to accept the net price of cotton but also to accept a reduction of his acreage, or baleage along with his brother members in the association in case of a favourable cotton year producing a surplus. He is thus forced to accept the rulings of his association in order to get his market.

Suggestions. This plan opens up an entirely new avenue for the distribution of farm products, and, like all new plans, will provoke argument criticism and suggestions. These are expected and desired. Fortunately these principles have been found successful in other industries and merely transferring them to the field of agriculture will not be so difficult. This outline is simply an introduction to the subject, and it is in line for improvement to fit the needs of the farmer. Being elastic and adaptable, various points of the plan can be used generally in farm marketing.

There are many angles to co-operative marketing, and competent leaders are at the helm assorting various points and fitting them together. The competitive system has inherent certain rules of marketing, and the three points emphasized in this outline are a necessity to a farm-marketing plan. While cotton was taken as an example to explain the principle of vertical alignment, other farm products could have been used to demonstrate its efficiency. We must remember that it is impossible to raise the price of raw cotton to a point where the planter is reasonably paid for his labour and investment unless we also give attention to the spinner and protect him against a high-priced raw material to buy and a low-priced fabric to sell and this is a situation which should at once be investigated by farm leaders.

The enthusiasm with which these principles have been received is gratifying and in a large degree it is due to the encouragement and assistance of many leaders in farming industrial and financial circles.

Cotton Picking in the Mississippi Delta



Cotton Gin Scene in the Delta

(By courtesy of the U S Department of Agricultural Economics)

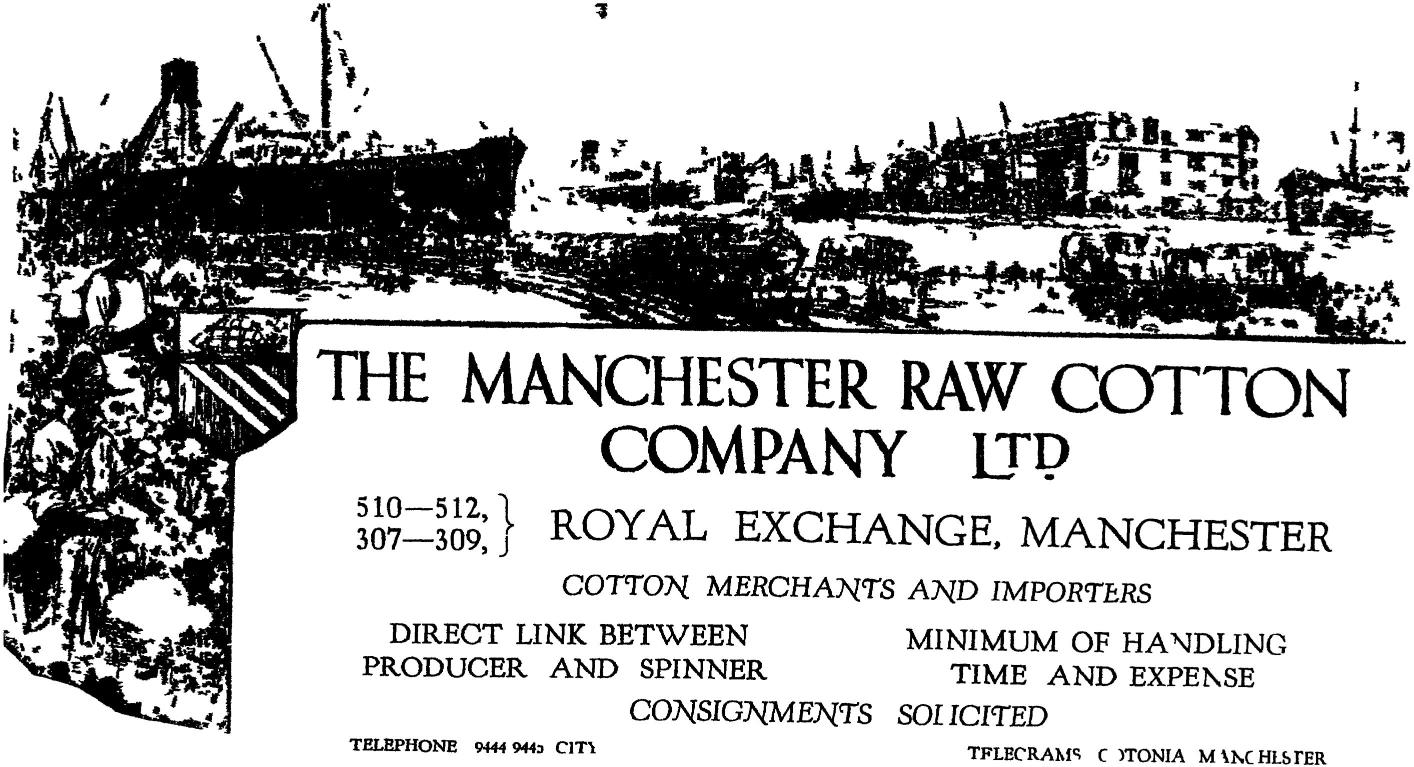
The Crop Reporting Board and Its Methods.

The following observations with reference to the Crop Reporting Board and the methods now employed in the preparation of its reports on the cotton crop were written by Mr J V Sinsabaugh, editor of Pearsall's News Bureau, New York who was present at the meeting of the board during the compilation of the October report Owing to shortage of space we are unable to give the author's complete article but reproduce that part of more interest to the European

THE PRESENT METHODS Since the adoption of the new methods a mistaken impression seems to have gained ground in some quarters that the board attempts to make allowances for departures from average after the date of their reports In the case of the boll weevil, regarding which certain significant information as to infestation, etc, is available, allowances have been made in the earlier-season reports for future damage exceeding or falling short of that ordinarily experienced In no other respect, however, does the board attempt to go beyond the data contained in reports received from their various classes of correspondents They cannot foresee future weather developments, nor do they attempt to do so Their estimates are compiled on the basis of the reports in hand and on an assumption of usual weather and growing conditions during the balance of the season

Before adoption of the present system three years ago the Crop Reporting Board as I understand it relied chiefly, if not entirely, upon the condition figures for its crop indications until late in the season, when ginning figures were taken into consideration While that was still the procedure, however the Board in its efforts to minimize differences between periodic reports and final returns was laying the ground for the inclusion of additional data The scope of their inquiry was broadened Relations of the supplemental data to final results were carefully studied and where found fairly constant they were adopted This naturally necessitated the introduction of more comprehensive methods as there were additional relations to be considered

PARS NO LONGER USED Under the system now used, the old "rule-of-thumb" method of interpreting condition figures has disappeared There is no longer, so far as I was able to observe, a mathematical formula for the translation of condition reports into terms of ultimate yields per acre In the old days, a "par" figure was determined on the basis of average results for ten-year five-year, and three-year periods Under that system "pars" for the interpretation of condition figures could be predetermined for every report in the reporting season, which in those days (except for the final estimate in December) ended on September 25th and these "pars" were published in advance Under present methods no "par" figures are published or formulated by the bureau The



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board's studies of the relationship of condition and yield indicated that a par which gave a reasonably accurate indication of yield on one portion of the condition scale would not do so on another portion of the scale. It was therefore impossible to predetermine a correct par. Accordingly, the board now steps directly from condition to indicated yield instead of indirectly, as formerly, through the medium of the par. Not only this, but the additional indications developed by research and experiment have been found, at times during the growing season, to maintain a closer relation to final yields than the condition figures.

THE MAJOR FACTORS. Altogether, if I counted them correctly, there are now six major indications and a number of minor indication which are considered by the board in making up its periodic reports.

1st: The acreage figures (determined in July).

2nd: Determination of the crop condition as reported.

3rd: Determination of the yield per acre as indicated by condition.

4th: Determination of the yield per acre indicated by reported "probable yield."

5th: Determination of bales indicated by crop reporters' estimates of total county ginnings.

6th: Determination of bales indicated by ginnings to date and from reports which are received from ginners on percentage ginned and from crop reporters on percentage picked and ginned.

7th: Reports concerning the stand; boll counts; safe bolls; size of bolls; damaged locks; and reports received from entomologists, experiment stations or other reporters concerning the extent of boll-weevil infestation and probable activity.

Quite obviously much more than the experience of a single "sitting" with the board would be necessary to a detailed or technical description of all the methods and refinements employed in the interpretation of these reports and in bringing them to the focal point of a single figure in bales for each of the individual states; from which figure the indicated yield per acre is calculated.

INDICATIONS INTERPRETED SEPARATELY. In a general way, however, each indication is interpreted separately on the basis of past relationships. The board has compiled a series of charts showing each of the major indications in relation to final results for each state and for each crop reporting period. There were used in the compilation of the last report, for instance, charts showing the relation of October 1st condition figures to final yields for a series of years and for each state, from which the value of the average of the condition reports received for the state in question could be read instantly. The relations of other data as of this average data were similarly charted. Readings from these charts reduced the various reports into the several indications of yield for each state. It could hardly be supposed that all these indications would point to exactly the same figures. In some instances [illegible] may come nearer it than would be expected, but in the very nature of things differences are inevitable

COMBINING THE VARIOUS INDICATIONS The task of the Crop Reporting Board, then, as I observed it, is to give each indication its proper weight in the formulation of the focal figures of indicated yield in bales for each individual state To aid in this process of reconciling and minimizing differences, additional charts have been prepared showing the relative reliability of each of these various indications as compared with final results during the series of years for each state and also for each stage of the growing season Then, too, the board has its minor factors to aid it in the proper relating of the major indications, and, in essence, one might, perhaps, liken the process to the calculation of a weighted average

Of course, the relative importance or value of the various indications used by the Crop Reporting Board must shift during the progress of the season Naturally, condition figures, data on stands and the situation as to weevil have greater weight early in the season than later Toward the end of the season ginning becomes a factor of greatly increased importance, while estimates of yields by counties and other data become more reliable With reference to late-season condition figures, however, it may be remarked, in passing, that crop reporters give a condition which is applicable to the entire season That is to say, they think of their crop as a whole in relation to normal, rather than of the present state of the plant

WORKING ON ADDITIONAL DATA While it would seem difficult to improve on the records of the past two seasons, the board is still investigating and establishing relations between yields and possible factors Part of the data they are now securing with reference to boll counts and allied features, for instance, has not been available for a sufficient period for relations to be fully determined In time these may prove of distinct value in the attainment of the Board's object That, as previously stated, is to perfect a system which will reduce the chances of any material change in periodic crop indications to such departures from normal in growing conditions as may possibly occur between the date of the report and final harvesting

In short it seems to me that the Crop Reporting Board, in action under the chairmanship of W F Callander, must impress the student of crop reporting, or any other observer for that matter, as a progressive body, slow to adopt a theory until it has been practically tested, but one which is keeping pace with all the trends in cotton production, and which is sparing no effort in the perfection or refinement of present methods, while keeping continually on the search for supplemental checks upon their conclusions

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MARKET REPORTS.

Messrs. E. A. Pierce & Co., New York, on the 26th December, wrote as follows:—

The Census Bureau recently reported ginnings to December 13 to be 13,461,630 running bales, which was 602,665 bales over the December 1 ginning figure. The Crop Reporting Board's estimate of the crop was 14,919,000 bales (of 500 lbs. gross weight), or about 14,725,000 running bales, leaving about 1,263,000 bales still to be ginned. Ginnings last season after December 13 were 1,152,000 bales, the year before 711,000 bales, and in 1926 2,215,000 bales. That such an amount can, and perhaps will, be ginned this season is entirely possible, but it is well to note that weather conditions have undoubtedly injured, to a greater degree than usual, the quality of the cotton lately gathered and to be gathered. The grade has been lowered distinctly and it is feared the staple in many cases has also become "perished." This condition, together with the fact that there is much more cotton of under $\frac{7}{8}$-in. staple than usual, certainly lowers the quantitative supply from a spinning point of view.

Due to the prominence now being given to the influence of cotton of foreign growth, it is interesting to note that a house, prominent in the handling of East Indian Cotton, has just estimated that crop at 6,430,000 bales (of 400 lbs. each) as against 6,980,000 bales last year. This loss of 460,000 bales (of 500 lbs. gross each), if it materializes, may yet be a factor of a constructive nature, in so far as American prices are concerned.

An equally important factor, however, may be found in the efforts that are likely to be made by the Federal Farm Board to control next year's acreage. Such control is almost a *sine qua non* for the eventual success of plans under the Agricultural Marketing Act. The final outcome in this respect will be interesting in view of the fact that heretofore acreage control has been largely a hit-and-miss affair. In the meantime, the trade at large is more concerned with the probable date of the definite passing of the depression in which the cotton industry, like many others, now finds itself immersed.

Messrs. Munds & Winslow, New York, in their market letter of 4th January, write:—

In expressing the view that there is a fairly even balance between supply and demand, we refer only to the *general statistical position* of cotton. There is evidence that real scarcity may manifest itself when it comes to tenderable grades ranging in staple from $\frac{7}{8}$ in. to $1\frac{1}{16}$ ins., and even when it comes to $1\frac{1}{8}$ ins. A rather anomalous situation has arisen. The Texas staple, as is well known, is inferior as a result of last summer's severe drought. Practically continuous unfavourable weather since mid-October has caused heavy damage to grades throughout the belt.

Far-sighted merchants, including both the largest interests and many of the rank and file of shippers, recognizing the impending scarcity of desirable cotton, have been heavy buyers and against their accumulations have flooded the contract market with hedge sales.

In the past there have been times when a congested trade short interest in contracts has been forced to pay the penalty through failure to proceed more aggressively with fixation. Conditions of this sort have laid the basis for penalizing "squeezes."

This season, however, the case is somewhat different. There has been a threatened scarcity in desirable cotton. Merchant buying has been confidently conducted on a large scale. Hedges have been sold against these accumulations, with every promise of protection, as a result of Southern delivery regulations which would permit huge tenders in case bull speculators attempted to make things troublesome for those short of future contracts against holdings of actual cotton.

The astute cotton shipper, recognizing a fairly ample *general* supply but the promise of scarcity in desirable grades and staples, as stated above, has bought these latter varieties freely, selling hedges against these accumulations, thus taking advantage of a situation that promises huge profits in a rising "basis."

If there had been a scarcity in the *general* supply, this would have been reflected in a rise in *contract* prices. Inasmuch, however, as the shortage promises to be in tenderable cotton, the operation is largely in the nature of an exploitation of the "*basis.*"

Several interesting and intricate problems are involved. Mills are faced by a scarcity of desirable grades, and are likely to be compelled to pay a high price for their raw material through an increase in the premium of spot cotton over contracts. The January position now around 17¼ cents looks as if cotton were cheap, but the mill requiring middling inch cotton, after paying the premium exacted by the merchant, may take an entirely different view of the situation. Middling inch cotton now commands a premium of about 200 points over March contracts, which would bring the price up to about 19½ cents.

The situation is an ideal one from the standpoint of the merchant who has been far-sighted enough to obtain a fairly large amount of desirable cotton and who has sold contracts against it. He is amply protected, and at the moment has every reason to believe that his gains through an increase in the premium of the actual over contracts will give him a handsome profit in the "basis."

Just how domestic cotton manufacturers and importing interests will extricate themselves from this position is a problem that can be solved only by future developments. The effect of this state of affairs on the contract market also is problematical. At any rate, it looks as if a rise in contract prices would not inure particularly to the benefit of the merchant holders of hedged cotton, as it probably merely would increase the buying resistance on the part of the consuming manufacturer.

The American Cotton Crop Service says:—

As to prospects for next season, our boll-weevil index shows that from 20 to 50 per cent. more weevils entered hibernation than last year, except in Oklahoma and Arkansas. Recent heavy freezes may have reduced the hibernating weevils somewhat. Acreage changes will, of course, depend somewhat upon future price movements. In a general way, we expect reductions where the crop was unprofitable this season but increases where farmers made money. The net change is difficult to forecast so early, but chances favour a minor decrease unless prices improve.

A report from Greenville, S.C., says several gins in that territory have installed new cleaning machinery, similar to the numerous gins in the West, wihich enables them to gin snapped cotton; this is an entirely new process for this part of the country.

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JOINT EGYPTIAN COTTON COMMITTEE.

President: H.E. Ahmed Abdel Wahab Bey.
Vice-President: W. H. Catterall.
First Past President: Wm. Howarth.

MEMBERS OF THE COMMITTEE:

Egypt:

H.E. Ahmed Abdel Wahab Bey, Under-Secretary of State, Ministry of Finance.
H.E. Emine Pasha Yehia, Cotton Exporter, Alexandria.
Dr. Lawrence Balls, Chief Botanist, Ministry of Agriculture.
H. M. Anthony, Director-General, State Domains Administration.
Fouad Bey Abaza, Director, Royal Agricultural Society.
Youssef Nahas Bey, General Secretary, General Agricultural Syndicate.
Constantin J. Choremi, President, Alexandria General Produce Association.
Hussein Enan Bey, Secretary of Egyptian Section.
B. Damiani, Assistant Secretary of Egyptian Section.

England:

William Howarth, Managing Director, Fine Cotton Spinners and Doublers' Association, 6, St. James's Square, Manchester.
Lt.-Col. N. Seddon Brown, Managing Director, Amalgamated Cotton Mills Trust, Preston.
W. H. Catterall, 504-508, Corn Exchange, Manchester,
  Chairman of Directors, Drake Spinning Co. Ltd., Farnworth.
  do. do. W. Mather & Co. Ltd., Bolton.
  do. do. Butts Mills Ltd., Leigh.
  Director, Bee Hive Spinning Co. Ltd., Bolton.

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Roger Seyrig, Etabs. George Koechlin, S.A., Belfort.

Germany:

Direktor A. W. Schütte, Crefelder Baumwollspinnerei, A.G., Crefeld.

Italy:

Prof. Paolo Alberzoni, Via Gesú 7, Milan.
  General Director of:
    Cotonificio di Chiavenna & Laveno,
    Cotonificio di Rovereto.

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W. Heaps, Manager, Shaw, Jardine & Co. Ltd., Manchester.
F. Wright, Joint Managing Director, Crosses & Winkworth,
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  Crosses & Heaton's Associated Mills Ltd., Bolton.

France:

Julien le Blan, Palais de la Bourse, Lille.

Germany:

Edmund Dilthey, Aug. Dilthey & Söhne, Mülfort.

Italy:

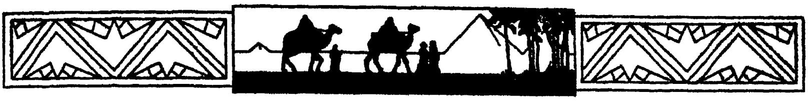
Dr. Silvio Soldini, Cotonificio Cantoni, Via Brera 12, Milan.

Czecho-Slovakia:

Ing. Otto Pick, Firma E. G. Pick, Oberleutensdorf.

The Minister of Agriculture of Egypt and the President of the Internationl Cotton Federation are ex-officio members.

General Secretary: Arno S. Pearse.
Assistant Secretary: John Pogson.



EGYPTIAN COTTON

MINUTES of the MEETING of the JOINT EGYPTIAN COTTON COMMITTEE held at the Ritz Hotel, Barcelona, on Monday, 16th September, 1929.

(These Minutes have been approved by all parties.)

There were present: His Excellency Ahmed Abdel Wahab Bey, H.E. Emine Yehia Pasha, Dr. W. Lawrence Balls, Messrs. H. M. Anthony, Fouad Abaza Bey, Youssef Nahas Bey, C. J. Choremi, Hussein Enan Bey, B. Damiani, and C. H. Brown (Egypt); Messrs. William Howarth, F. Holroyd, Lt.-Col. N. Seddon Brown, W. H. Catterall, W. Heaps and G. Berry (England), Roger Seyrig (France), Dr. W. Böhm (Germany), P. Alberzoni (Italy), Caspar Jenny (Switzerland), Otto Pick (Czecho-Slovakia), Arno S. Pearse (General Secretary), and John Pogson (Assistant Secretary).

Mr. William Howarth occupied the chair.

The Minutes of the Brussels Meeting, as printed and circulated, were taken as read and adopted.

The General Secretary stated that with regard to the Minutes of the Zurich Joint Meeting the Vice-President of the Egyptian Section, His Excellency Emine Yehia Pasha, wished it to be stated that his remarks on the mixing of varieties at the Zurich Meeting were made by him in his capacity as a member of the Egyptian Government Section, and not as exporter or as member of the Alexandria General Produce Association, and that the paragraph in the Minutes starting: "The Egyptian shippers thought that mixing was due," etc., should read: "It was thought that if mixing exists, this was due," etc.

ELECTION OF PRESIDENT.

On the motion of Mr. William Howarth, it was unanimously resolved that His Excellency Ahmed Abdel Wahab Bey be elected President of the Committee for the ensuing year, as, in accordance with the Statutes of the Joint Committee, the Presidency should every year be occupied by a different member.

His Excellency acknowledged with gratefulness the honour conferred upon him. On behalf of the Committee he expressed sincere thanks to Mr. Howarth for the valuable services he had rendered to the Committee during the past twenty months.

ELECTION OF VICE-PRESIDENT.

Mr. **WILLIAM H. CATTERALL** (England), was, on the motion of the President, unanimously elected Vice-President of the Committee for the ensuing year.

STANDARD OF MOISTURE FOR EGYPTIAN COTTON.

Mr. **HOWARTH** reported that the European spinners had met that morning to further consider this question. On the facts arrived at by Dr. Balls and other authorities, Mr. Howarth said, they saw no valid reason to depart from the resolution arrived at on the subject in Zurich and reaffirmed at Brussels.

The President referred to the informal meeting which the Egyptian Section had held that morning with representatives of the exporters. After a lengthy discussion, His Excellency stated that it had been decided to propose to the Joint Egyptian Committee that 8.3 per cent. should be regarded as a minimum and 9.3 per cent. as a maximum percentage for humidity.

The President and other speakers, on behalf of the Egyptian Section of the Committee, stressed the great value of securing the adoption of the principle of a "standard" for moisture.

Dr. **BALLS** spoke of the difficulties and objections to the "rebate" part of the spinners' proposal. He said it was quite impossible to make up a bale of cotton to exact moisture content. His sole object was to create the least possible disturbance to the trade. He submitted figures showing the effect of the "toleration," if agreed to in the form proposed by the spinners, and considered that the minimum and maximum figures suggested by the Egyptian Section might be sympathetically considered by the spinners' representatives and adopted for one year, as an experiment. Above all, he said, the question of the "principle" in this matter was the most important.

Mr. **HOWARTH** emphasized the position of the European spinners on the question in the light of their discussion that morning; he said that it was a serious matter from a spinner's point of view. This would be at once realized when he stated that in regard to his own Association—the Fine Cotton Spinners and Doublers' Association—excess moisture represented between £35,000 and £40,000 per annum.

After some further discussion it was left with the spinners' representatives to argue the question before the exporters.

Mr. H. B. **CARVER** and Mr. H. **LINDEMANN**, representatives of the Alexandria General Produce Association, were then invited to attend before the Committee.

Both Mr. Carver and Mr. Lindemann covered the same ground that they went over at the Brussels Meeting, and summarized in the resolution of the Alexandria General Produce Association. They stated that they had no mandate to go beyond the position they then took up. This was 8.7 per cent. as a minimum and 9.3 per cent. as a maximum, the amount of moisture to be ascertained at a testing-house in Alexandria. If their proposal was agreed to, they stated, it would help matters very much, and, after all, a guaranteed amount of moisture such as it included would be worth striving for.

Both Mr. HOWARTH and Mr. CATTERALL reminded the representatives of the Alexandria General Produce Association that when the Congress took place in Egypt they promised to be ready with power to finally settle the matter. They felt personally that a further postponement of the subject would be looked upon with great disfavour by European spinners.

The representatives of the Alexandria General Produce Association then retired, and, after a long discussion on the part of the General Joint Committee, it was ultimately decided that the European spinners should discuss the matter among themselves. The Spinners' Section then formulated the following resolution, and Mr. W. H. Catterall submitted it to the Joint Egyptian Cotton Committee:—

> "Whilst the spinning members of the Joint Egyptian Cotton Committee are firmly convinced that 8½ per cent. is an adequate allowance for moisture content in Egyptian cotton, they are prepared to make an agreement with the Alexandria General Produce Association that for a period of twelve months, commencing 1st January, 1930, they will undertake, as a temporary measure, that in the event of the moisture content in any consignment exceeding 9 per cent., not to claim in excess of 8¾ per cent."

After some discussion, the representatives of the Alexandria General Produce Association were again received, when the President read the decision of the spinners.

A long discussion ensued, but no progress was made, and eventually further consideration of the question was deferred, and the Exporters' representatives withdrew.

MIXING OF DIFFERENT EGYPTIAN COTTON VARIETIES.

His Excellency AHMED ABDEL WAHAB BEY addressed at length the Committee, pointing out that the Egyptian Government, acting on the unanimous decision of the spinners, as declared at the Congress in Egypt and at the Committee Meetings at Zurich and Brussels, had drafted a law prohibiting the mixing of different varieties of Egyptian cotton at the ginneries and presses. What measures are to be taken to prevent this mixture, he said, is entirely a question for the Egyptian Government.

One argument against the proposed law raised by the Alexandria exporters was that spinners *did* wish to have mixed varieties, and, in order to prove their case, they submitted a letter purporting to come from a spinner, in which he asked for a mixture of varieties. His Excellency said: "Have you changed your minds from the decisions arrived at in Egypt, Zurich and Brussels?"

Mr. WILLIAM HOWARTH reaffirmed, on behalf of the Spinners' Section, that they decidedly wished to see such mixing stopped at the ginneries and pressages; he thought that the Alexandria General Produce Association might be consulted in some way in arriving at the measure for the prevention of the mixing. The following resolution was unanimously adopted:—

> "That this Joint Committee reaffirms the decision arrived at in Zurich, i.e., that it is of opinion that the mixing of

varieties of Egyptian cottons at the gins or pressages be prohibited."

The meeting was then adjourned until 10 a.m. the following day.

MINUTES of the ADJOURNED MEETING of the JOINT EGYPTIAN COTTON COMMITTEE, Ritz Hotel, Barcelona, Tuesday, 17th September, 1929.

H.E. AHMED ABDEL WAHAB BEY IN THE CHAIR.

CABLEGRAM TO HIS MAJESTY KING FUAD.

Before commencing the ordinary business it was unanimously decided, on the motion of Mr. WILLIAM HOWARTH, that the following cablegram be despatched to HIS MAJESTY KING FOUAD:—

> "This Joint Egyptian Cotton Committee avails itself at this meeting at Barcelona to extend to Your Majesty the expression of high appreciation for the valuable support you have always shown in the work of this Committee, and hopes that Your Majesty will continue to aid with further co-operation in its aims."

The reply received from H.M. King Fouad was in the following terms:—

> "I am sincerely pleased to receive the telegram which you have sent in the name of the Egyptian Joint Cotton Committee, which met at Barcelona. I thank you cordially, and express the hope that this Committee will continue to act for the best interests of the cotton industry. I am happy to be able to assure you of my entire co-operation, and of my best wishes for the success of the aims it has set itself, and which, I consider, are most worthy."

STANDARD OF MOISTURE.

The President then made an earnest appeal to the European spinners to reconsider seriously the humidity question, with a view to finding a solution to an intricate subject which had been agitating the minds of all concerned for 17 years. As one of the Egyptian Section, but not an exporter nor a spinner, he was anxious that neither should be unfairly treated, and he fervently hoped that in a spirit of goodwill and desire to make substantial progress as a Joint Committee, the spinners would make a further effort to bridge the difficulty. The exporters, on the other hand, had advanced in that direction, as they had never before been willing to agree to any guaranteed amount of moisture content in Egyptian cotton.

The European spinners, in deference to the suggestion of the President, retired to reconsider the matter, as a result of which they arrived at the following conclusion:—

> "Whilst the spinning members of the Joint Egyptian Cotton Committee are firmly convinced that 8½ per cent. is an adequate

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allowance for moisture content in Egyptian cotton, they are prepared to enter into an agreement with the Alexandria General Produce Association that, for a period of 12 months, commencing 1st December, 1929, and as a temporary measure only, they will not claim for excess moisture unless 9 per cent. regain is exceeded, in which case the rebate will be retrospective and start from 8.9 per cent."

This was afterwards read to the representatives of the Alexandria General Produce Association, and finally it was jointly agreed to recommend the resolution for adoption to their respective members, Mr. Carver adding:—

> "It is, of course, on the understanding that such agreement is to be in force until November, 1930, when the Joint Egyptian Committee will meet in Egypt, at the end of which time either side, or both sides, may be at liberty to end the agreement or come to a further understanding if they wish to do so. You may rely upon us doing our best to end this vexatious question, which has been annoying everybody for many years."

The Chairman expressed thanks to Mr. Carver and his colleagues for the goodwill and the excellent way in which they had endeavoured to meet the desires of the spinners, and at the same time to safeguard the interests of the exporters. It was indeed the greatest success the Joint Egyptian Cotton Committee had so far accomplished.

Arising out of the decision arrived at, the following method of determination of moisture was agreed to:—

METHOD OF DETERMINING MOISTURE.

(1) That samples drawn from 10 per cent. of the shipment be considered representative of the whole; say 10 bales to be sampled out of a shipment of 100 bales.

(2) That when the samples are drawn at port of arrival, this work to be done in the presence of a representative of the exporter by sworn weighers, who will also take the exact landing weight.

(3) That when the bales are sampled at the mill the representative of the Alexandria shipper is to be invited to be present. The sampling is to be done within seven days of arrival at the mill.

(4) All tests to be carried out by the official testing-houses in the various countries, and their results to be accepted as binding for both parties.

METHODS FOR REPORTING CONDITIONING TESTS OF EGYPTIAN COTTON.

The following resolution was unanimously adopted:—

> "The spinners' representatives of the Joint Egyptian Cotton Committee unanimously recommend to the affiliated spinners that whenever a test for humidity is made on their behalf they should, if requested, communicate the result to the respective cotton shippers in Alexandria."

PUBLISHING OF MOISTURE TESTS.

It was resolved that the results of the moisture tests forwarded to the International Cotton Federation should be published in the

INTERNATIONAL COTTON BULLETIN, without the names of the shippers or spinners.

NEW VARIETIES OF EGYPTIAN COTTON.

Dr. LAWRENCE BALLS said that the Barcelona Congress paper on "Some New Strains of Uppers" had been prepared in order that every fact known about these strains should be available to the public. The testing of varieties for locality preference had been elaborated into a very complete system, by the use of which Mr. Brown had made the discoveries which he would himself describe to them.

Mr. C. H. BROWN explained that the most important event at the moment in Egyptian cotton growing was the development of a new area in Southern Upper Egypt. Not only is this new area increasing its cotton acreage rapidly, but it has been found to suit long-staple types. The first of these, with a staple similar to Pilion, Giza 3, may be sown on between 40,000 and 50,000 acres in 1930, to be followed in subsequent years by a still better-stapled cotton, Giza 7, which will very largely do the work of Sakel. It is hoped that this area will make possible an important increase in the long-staple supply at competitive prices. The position of the older Uppers areas is meanwhile strengthened by the propagation of a high-yielding type, New Ashmouni.

In the Delta the position is not quite so simple; the same variety, Giza 7, also does well here, and it is hoped to propagate it in the north as Maarad develops in the south, and these two varieties between them may be expected largely to displace Sakel on account of their higher yield. A new super-Sakel type, Sakha 4, is being brought in which will meet the demands of those requiring the best-stapled cotton; its yield is better than Sakel, especially on wilt-infected soil, but less than that of Maarad and Giza 7.

FOUAD ABAZA BEY said: "Referring to Mr. Brown's statements about MAARAD cotton, I beg to add that in view of keeping the comparative purity of this cotton, and avoiding as much as possible the fate of deterioration from mixing, the Royal Agricultural Society of Egypt has kept in its hands the sole ownership of Maarad seed.

Growers have to sell back to the Society all the seed produced, which takes great care in controlling the ginning and decides what quantities of seed are fit for propagation, and the rest is sent off for crushing.

Cultivators, however, are free to sell the fibre to whom they like, and to facilitate this sale the Society entered into agreement with leading houses in Alexandria, including Choremi, Reinhart, Lindemann, Planta, Rolo, to dispose of the crop; but the cultivator is free to sell to these or to others.

Last year's crop was about 50,000 cantars; this year it covers 30,000 acres, with probable production of 150,000 cantars or 20,000 Egyptian bales.

The fibre can be obtained in the open market; it is under no monopoly.

The production is increasing. Maarad cotton is 25 to 30 per cent. more yielding than Sakel, the fibre is longer, finer, and approximately as strong as Sakel. The colour is creamy, and is approaching Sakel colour every year, and is getting stronger and stronger.

Last year's report on Maarad cotton of the State Domains, received from Bollington Station, was very satisfactory, especially on strength and other qualities.

Many other reports received from various mills are very satisfactory, and the Royal Agricultural Society is convinced that this Maarad cotton will meet the views of both cultivator and spinner.

If some spinners find difficulty in spinning Maarad, it is probably due to the machines not being set right for Maarad. It may be interesting to bear in mind that Maarad is produced from Pima, which in its turn is a mutation from the old Egyptian Mit Afifi.

In the 1927 Cairo Cotton Congress the wish was expressed to produce a heavy-yielding cotton of good quality and long fibre, so as to enable the grower and the spinner to have it sold or bought at a cheaper price than Sakel. Maarad cotton responds to this wish; it is practically as good a cotton as Sakel, and is 1d. to 1½d. per lb. less than Sakel, because of its high-yielding quality.

This cotton is spreading in the Delta of Egypt, and the Royal Agricultural Society is looking after its expansion and supplying its pure seed."

Mr. WILLIAM HEAPS spoke favourably of the spinning qualities of Maarad cotton.

DATE AND PLACE OF NEXT MEETING.

The date and place of the next meeting were left to the decision of the President and Vice-President.*

The meeting terminated with a vote of thanks to the Chairman, on the motion of Mr. F. Holroyd.

His Excellency, in responding, expressed satisfaction at the results that had so far been attained, and he hoped that in a spirit of goodwill and co-operation still greater good would be accomplished by the Joint Egyptian Cotton Committee, in the interests of all engaged in the growth and consumption of Egyptian cotton.

Humidity Standard in Egyptian Cotton.

COPY OF LETTER FROM THE ALEXANDRIA GENERAL PRODUCE ASSOCIATION.

Alexandria, 21st November, 1929.

The President,
The International Federation of Master Cotton Spinners' and Manufacturers' Associations, Manchester.

Re HUMIDITY IN COTTON.

DEAR SIR,

In accordance with the decisions adopted at the Barcelona Cotton Congress, the following resolution was laid before the exporters in Alexandria at their meetings on the 12th and 19th November —

---

* It was later decided that a meeting should take place in Egypt in November.

> ' Whilst the spinning members of the Joint Egyptian Cotton Committee are firmly convinced that 8½ per cent is an adequate allowance for moisture content in Egyptian cotton, they are prepared to enter into an agreement with the Alexandria General Produce Association that, for a period of 12 months commencing 1st December, 1929, and as a temporary measure only, they will not claim for excess moisture unless 9 per cent regain is exceeded, in which case the rebate will be retrospective and start from 8 9 per cent "

Method of determining moisture —

"(1) That samples drawn from 10 per cent of the shipment be considered representative of the whole, say 10 bales to be sampled out of a shipment of 100 bales

(2) That when the samples are drawn at port of arrival this work to be done by sworn weighers in the presence of representative of exporters, who will also take the exact landing weight

(3) That, when the bales are to be sampled at the mill, the representative of the Alexandria shipper to be invited to be present The sampling is to be done within seven days of arrival at the mill

(4) All tests to be carried out by official testing houses in the various countries, and their results to be accepted as binding by both parties "

I have to inform you that at the foregoing meetings the following resolution was adopted by 75 per cent of the exporters present —

> " Whilst adhering to the principle already adopted by the unanimous vote, on the 26th April, 1920, of a guarantee of the damp contents in cotton, they regretfully decline to accept the proposals submitted by the Barcelona Congress "

It was further unanimously decided —

> " That a letter be addressed to the International Federations of Master Cotton Spinners' and Manufacturers' Associations to the effect that, whilst the Alexandria exporters are not unwilling to accept a reduction in the maximum and minimum figures of humidity to be allowed in cotton, they are desirous that spinners also give due consideration to the exporters' desiderata regarding the procedure to be followed in establishing the humidity contents of cotton exported
>
> " In view of the advisability of arriving at a solution which would ensure fair treatment to all parties concerned, and render such agreement permanently workable, it is recommended that a further discussion of these details should take place at a meeting to be arranged between the accredited delegates of both parties It is suggested that such meeting be held at the time of November, 1930, meeting in Egypt of the Joint Egyptian Cotton Committee decided at the Barcelona Congress, at which the Alexandria exporters would submit

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(S.A.E.)

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(P O.B. 1608)
ALEXANDRIA (EGYPT)

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President.
HIS EXCELLENCY EMINE PACHA YEHIA

◆

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LABURNUM SPINNING CO., Atherton
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PEAR NEW MILL CO., Stockport
RUMWORTH SPINNING CO., Bolton
SPARTH MILLS CO., Rochdale
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their proposals, and in the meantime the *statu quo ante* would be maintained.

"The Alexandria exporters, who, during the last season, have taken humidity tests of about 25 per cent of the crop and submitted these to spinners, consider it is essential, in order to possess a better basis for future negotiations, that spinners should inform their shippers regularly of the result of all tests taken of their respective shipments, as suggested at the Barcelona Congress."

I beg to remain, dear sir,
Yours faithfully,
(Signed) C. J. CHOREMI,
President.

COPY OF LETTER FROM THE INTERNATIONAL COTTON FEDERATION IN REPLY TO THE ABOVE LETTER.

Manchester, 17th December, 1929.

The President,
Alexandria General Produce Association, Alexandria.

DEAR SIR,

Referring to your letter of the 21st ultimo, I am instructed by my Committee to inform you that each affiliated association has carefully considered your letter, and that they wish the following reply to be sent to you:—

The members sincerely regret that in spite of the promise given at the Barcelona Congress by the President and the duly appointed delegates of your Association, to use every effort to get the Barcelona resolutions accepted, they have not succeeded.

My Committee express the hope that your members will reconsider the decision arrived at in your meetings of the 12th and 19th November. We would regret if your further negative attitude should necessitate our approaching the Egyptian Government to intervene for the purpose of instituting legislation in the matter of humidity in cotton.

The spinners cannot maintain a *status quo ante*, as you suggest. Our members will make many more tests than heretofore, and each will take whatever action he considers suitable in case of excessive moisture, but everyone will certainly claim allowances for damp where it exceeds 9 per cent. regain.

In view of the negative attitude of your Association the spinners regret that they cannot see their way to supply the Alexandria shippers regularly with the results of the tests made.

We shall continue to compile our usual confidential lists, and the final figures of these will be at your disposal at the proposed meeting in November, 1930.

The undersigned will be in Alexandria during the early days of January, and the hope is expressed that you will be able to obtain by then the necessary adherence of your members to the Barcelona Congress resolutions.

Yours faithfully,

(Signed) ARNO S. PEARSE,
General Secretary.

COPY OF CIRCULAR ISSUED BY THE ENGLISH FEDERATION OF MASTER COTTON SPINNERS' ASSOCIATIONS:—

(Similar circulars have been issued by each National Association to their respective members.)

ROYAL EXCHANGE, MANCHESTER,
7th December, 1929.

MOISTURE IN EGYPTIAN COTTON.

DEAR SIR OR SIRS,

I am instructed to inform you that the Alexandria General Produce Association has rejected the following provisional agreement reached at Barcelona in September, and which was adopted at the Cotton Congress:—

> "Whilst the spinning members of the Joint Egyptian Cotton Committee are firmly convinced that 8½ per cent. is an adequate allowance for moisture content in Egyptian cotton, they are prepared to enter into an agreement with the Alexandria General Produce Association that, for a period of twelve months, commencing 1st December, 1929, and as a temporary measure only, they will not claim for excess moisture, unless 9 per cent. regain is exceeded, in which case the rebate will be retrospective and start from 8.9 per cent."

The position was considered by the English representatives on the Joint Egyptian Cotton Committee at a meeting held on the 3rd instant, when it was unanimously decided to request every member using Egyptian cotton to take steps to test most of the shipments received from Egypt in regard to the amount of moisture content.

It is recommended that these tests should preferably be undertaken by the Manchester Chamber of Commerce Testing House. If, however, tests are made by spinners themselves, at their own mills, the method adopted should be as follows:—

> Take samples, not less than 1 lb. in all, from various layers of the bale from the outside to the core, at a height of about two-thirds of the bale; pack these samples at once in an air-tight tin; obtain the net weight of the samples; dry them in a temperature of 105 to 110 degrees centigrade; ascertain the absolute dry weight by drying the samples until they cease to lose weight after three successive weighings within a quarter

of an hour difference from each other. When there is no further loss of weight the dry weight is established.

It is felt that, in these cases, it would be an advantage if members concerned would arrange to have the tests checked occasionally by the Official Testing House of the Manchester Chamber of Commerce.

If you are a user of Egyptian cotton, I shall be glad if you will kindly take the necessary steps herein referred to and forward the results of the tests to me at these Offices.

The reports containing the results of the tests should indicate:

(1) Date of shipment from Alexandria.

(2) Date of arrival at the mill.

(3) Quantity of bales represented by the test.

(4) Kind of cotton, say, Uppers or Delta.

(5) Percentage of moisture content on wet weight.

(6) Percentage of moisture content on dry weight.

(7) Name of shipper in Alexandria.

In the event of your firm receiving shipments of Egyptian cotton, containing moisture in excess of 9 per cent., you are requested as from 1st December, 1929, to insist upon an allowance being made by the sellers of the cotton in accordance with the Barcelona Congress resolution, viz., if the regain exceeds 9 per cent., the claim should start from 8.9 per cent..

You are also asked to report to this Office the names of any cotton shipper or merchant who refuses to make an adequate allowance.

Your co-operation in, and attention to, these matters will oblige.

Yours faithfully,

JOHN POGSON, *Secretary.*

Every Association affiliated with the International Cotton Federation has taken similar action, and reports to hand from several Spinners show that they have obtained a guarantee of moisture from their Alexandria Cotton Shippers, ranging from 8½% to 9%.

ARNO S. PEARSE,

General Secretary.

How to Use Maarad Cotton. Actual Experience of a Continental Spinning Mill.

In order to test the suitability of Maarad cotton from the point of view of its taking the place of Sakellaridis, considering the continually growing depreciation of this latter variety, we have made trials on the machines with two bales of Maarad cotton. The trials were made with 640 kg. (1,411 lbs.) and the following is a résumé of the results obtained, and the observations made during the spinning process.

STAPLE. On pulling the staple of the raw cotton, and after, from the sliver, we have established a staple-diagram, showing a maximum length of fibre of 43/44 mm. while present day Sakellaridis of corresponding grade shows hardly more than 38/39 mm.

REGULARITY. We found the regularity considerably better than in present Sakellaridis.

CLEANNESS. The two bales contained very clean cotton; it was especially free from dead pieces, which are often to be found in considerable quantities in Sakellaridis.

CHARACTERISTICS OF THE STAPLE. The staple distinguished itself by its great fineness and suppleness, and it possesses a fine natural lustre.

HUMIDITY. On considering the two bales we found a normal degree of 7.4 per cent.

WASTE. In order to establish the percentage of waste, we always use 300 kg. (661 lbs.) of raw cotton, which is weighed carefully, the tests being pursued as far as the carding machines and the weight of waste from each machine being carefully recorded. Besides the figures obtained in the Maarad tests, we give for comparison the respective average figure from seven lots of Sakellaridis which we have worked during the same season.

WASTE IN THE BLOWING ROOM.

	Maarad		Sakel	
	Kg.	lbs.	Kg.	lbs.
Cylinder-opener I	2·100	4·63	2·265	4·990
Hopper-feeder	0·750	1·65	0·960	2·120
Cylinder-opener 2	1·150	2·45	1·285	2·830
1st Scutcher, fly	0·420	0·93	0·410	0·904
.. neps	0·460	1·01	0·400	0·880
2nd Scutcher, fly	0·210	0·46	0·170	0·375
.. neps	0·355	0·78	0·335	0·739
Total amount of waste in Blowing Room	5·905 1·96%	13·02	6·610 2·2%	14·572

WASTE IN THE CARDING PROCESS.

	Maarad		Sakel	
	Kg.	lbs.	Kg.	lbs.
Carding Cylinder	3·700	8·16	3·053	6·69
Tops Cards	10·780	23·77	9·500	20·95
Fly	2,688	5·91	2·870	6·33
Sweeping	1,030	2·27	0·620	1·37
Total amount of waste in Carding	18·190 6·4%	40·11	16·025 5·33%	35·34

USE

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TOTAL RESULT OF TEST.

	Maarad Kg.	Maarad lbs.	Sakel Kg.	Sakel lbs.
Raw cotton used for test ...	300·000	661·50	300·000	661·50
Cleaned Cotton (Card Sliver)	270·020	595·49	268·060	591·17
Total Waste	29·960 10%	66·11	31·940 10·65%	70·43
Of which non-traceable loss ...	5·905 1·97%	13·02	9·370 3·1%	20·63

The foregoing figures show that for Maarad cotton the percentage of waste in the blowing room is somewhat smaller than for Sakellaridis. Especially the amount of sand is much smaller in the Maarad tests, which accounts for the small evaporation figure. However, this advantage may be partly lost again through excessive moistening of the cotton in Egypt.

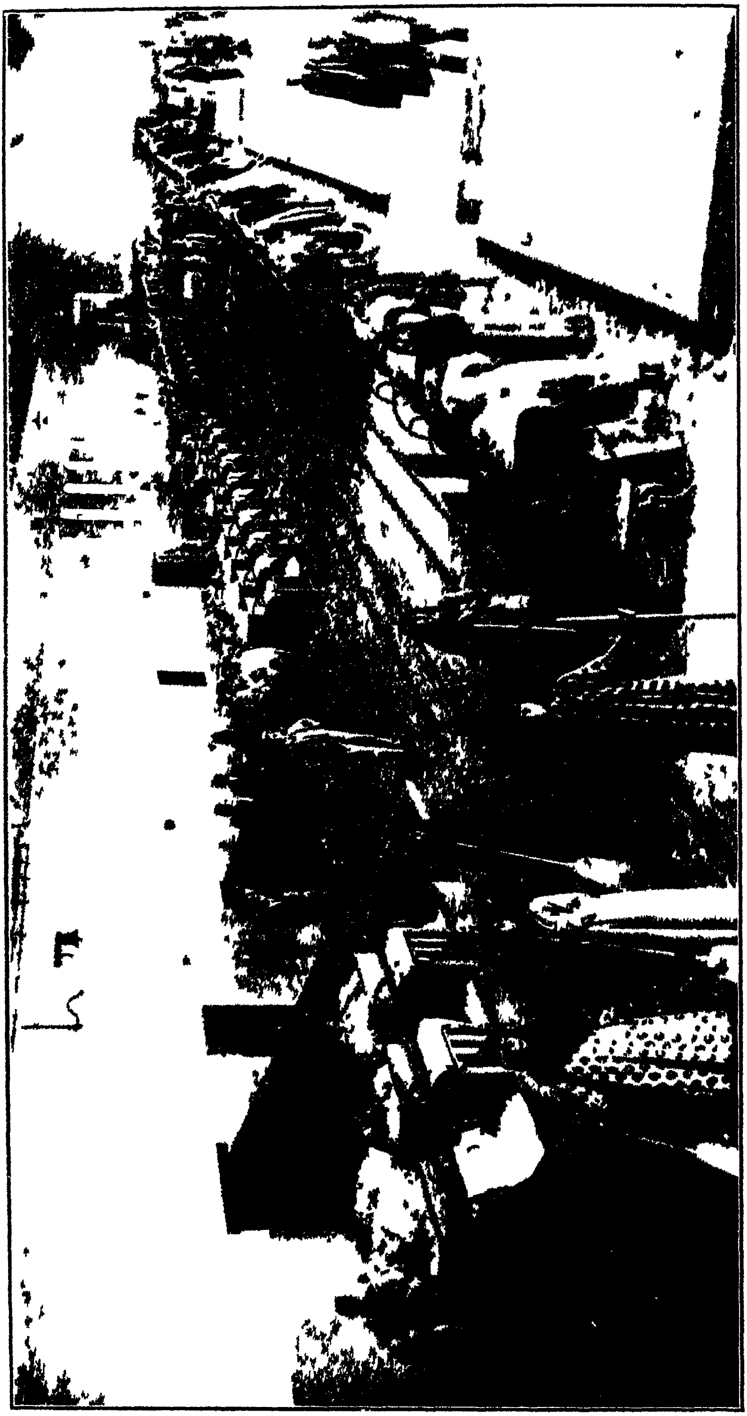
In working Maarad cotton, the spinner to-day makes the same experience as he did with Sakellaridis, at the time when this latter growth had a longer staple than at the present time. The long fibres are exceedingly difficult to disentangle. *In order not to damage the fibres, it is essential that the beating on the scutchers should not be too hard, and on all the subsequent machines, up to the intermediate frame, the number of revolutions of the mainshaft should be reduced.*

CARDING. The proportion of waste in the carding room is reversed, as compared with that in the blowing room; this in itself would rather be an indication for shorter fibres. However, it is just here where the number of revolutions of the mainshaft plays an important part. This number should be reduced from 185 to about 150, in order that all the carding operations may take place more slowly, thus disentangling the fibres carefully without grinding them.

COMBING-FRAME. The comber waste for Maarad was only 20 per cent., as against 24 per cent. for Sakels, on this machine, but especially so on the drawing, slubbing and intermediate frames; the number of revolutions must be reduced when Maarad is being worked. Too fast revolving rollers on these machines produce coarse rovings, the material gets wound round the rollers, the stripping-rollers fill quickly, and the result is an uneven yarn.

At the slubbing and intermediate frames, the loss in the production caused by the slower action of the machines is partially compensated by the fact that a smaller number of twists can be given to the fine roving of Maarad than to that of Sakels.

FINE SPINNING. On the ring frame we first made No. 72.3/4 chain, and we have made the following observations. For comparison we again append figures of Maarad and of Sakel lots previously worked during the same season. In accordance with the longer fibre of Maarad, the setting of the rollers, already from the third passage of the drawing frame, should be from 2 to 3 mm. wider than that for Sakellaridis.



A Model Ginning Factory in Mansourah, Egypt

STRENGTH OF YARN, No 27 3/4 WARP

Spun on Self actor	Maarad	Sakel
Twist per 1 in		26 3
Coefficient of Twist		3 1
Effective Count		71 3/4
Strength of Double thread in grammes		231 0
Regularity	— —	8 7

Spun on Ring Frame	Maarad	Sakel
Twist per 1 in	26 70	28 20
Coefficient of Twist	3 14	3 32
Effective Count	71 3/4	72 00
Strength of Double thread in grammes	237 00	224 00
Regularity	8 1	8 9

This comparison, which in each case represents the average from 10 different tests, shows the undoubted superiority of Maarad over to-day's Sakellaridis The strength as well as the regularity of the yarn is better A great advantage is that yarn made from Maarad mercerizes exceedingly well, as it requires a smaller number of twists, in order to attain a certain strength than in the case with Sakel of to-day Experience with Sakels shows that the smaller the number of twists that has to be given to the yarn, the better is the brilliance of the thread after mercerization

As far as we can judge Maarad from experience made so far, we are of opinion that this new variety is qualified to replace Sakellaridis, if not to surpass it

GOVERNMENT'S PURCHASES.

The Egyptian Government announces that, while still ready to purchase all January Sakel contracts offered at $27, and February Ashmouni contracts at $19, it is also prepared to buy all contracts which are offered to it in the March and April deliveries at $27 50 for March Sakel contracts and $10 40 for April Ashmouni contracts

In all transactions the Government will call for delivery of the actual cotton sold

MARKET REPORTS.

The Egyptian Produce Trading Co, Alexandria, under date 2nd January, write as follows —

Since the issue of our previous report Sakels (January) have fallen 9 points, whereas Uppers (February) have advanced 14 points and New York (January) 9 points

In consequence of the holidays, the fortnight under review offered little of interest Until quite lately foreign demand remained dull, but during the past three days there seems to have been a moderate revival of interest in most quarters America has made practically no purchases, whereas Lancashire has taken some

Sakel, and the Continent has favoured us with sporadic orders. Purchases for account of the Soviets have also been evidenced.

The Government's decision to purchase March at $27.50 and April at $19.40 resulted in a considerable widening of the disparities between the near and the later positions. The January-March difference thus moved from 32 to 97 points, and the February-April spread from 19 to 50 points. The November delivery had been subjected to heavy bear pressure on the assumption that, since the Government had taken no action in regard thereto, its level was bound to follow the decline of American cotton, but on rumours of an appreciable reduction in Sakel acreage, the "shorts" promptly liquidated, and prices bounded up some 100 points. It is obvious, of course, that all these movements are of a purely artificial nature, and do not tend to facilitate normal commercial intercourse.

The Government's purchases this season amount so far to Crs.9250 Sakel and Crs.235,000 Uppers. The issue of January tenders, up to the time of publishing this report, amounts to Crs.97,500, the major portion of which will be taken up by the authorities.

Receipts since the beginning of the season amount to Crs.4,959,409 and exports to Crs.2,869,688 as against Crs.5,635,926 and Crs.3,105,085 at the same time last year. Stocks at Minet-el-Bassal total Crs.3,253,944, whereas a year ago they stood at Crs.3,594,070.

SPOT MARKET

Trade was broken into by the holidays, and was not brisk; the total quantity of cotton that changed hands amounted to 18,364 bales as against 35,486 the previous fortnight and 17,220 during the same period a year ago.

Sakel was offered freely, but did not arouse much interest; the basis for these styles remains somewhat feeble despite the approaching January delivery. An illustration of the unfavourable position of spot cotton is provided by the abundant January tenders, despite a premium of 97 points for the March position.

Uppers also have suffered from neglect, Zagora in particular being difficult to dispose of.

Pilion attracted no attention, whereas Maarad has benefited by fresh enquiries, and the basis has consequently stiffened. Nahda is not in request; Fouady is practically non-existent.

COTTON

		Exports					
	Receipts Cantars	U K Bales	Continent Bales	U.S A. Bales	Total Bales	Total Cantars	Stocks Cantars
This week ..	178,717	5,832	11,599	2,580	20,011	147,671	3,253,944§
Same week, 1929	222,297	6,753	13,974	4,172	24,899	183,205	3,594,070
Same week, 1928	169,507	3,256	6,362	2,410	12,028	88,649	3,309,038
From Sept. 1, 1929	4,959,409	155,772	188,588	44,471	388,831	2,869,688	—
Same period, 1928	5,635,926	167,324	200,143	66,221	433,688	3,195,085	—
,, ,, 1927	3,967,680	123,070	154,297	54,341	331,708	2,438,642	—

Including stock § to Sept 1, 1929, Crs. 1,164,223, at Sept. 1, 1928, Crs. 1,153,229, Sept. 1, 1927, Crs. 1,780,000.

§ In this stock of Crs. 3,253,944 are included Crs. 298,484 purchased by the Egyptian Government.

The Alexandria Commercial Co. (S.A.), in their weekly report dated 9th January, write as follows: —

SAKEL. The week opened with a rather heavy session as a result of the large quantity of cotton delivered against the first January tender, the amount being 97,500 cantars, a much larger figure than was generally anticipated. Practically the whole of the tender eventually passed to the Government, and once this out of the way, a slightly better tone became evident. Another factor which contributed to steadying the tone towards the end of the week was some substantial buying of March by a group of local speculators at about $28. These operations are apparently based on the fact that in the worst event the risk of loss is limited to $½ per cantar as the Government has declared itself a buyer of March at $27½; on the other hand, unforeseen events might happen during the next two months causing an appreciable rise in the market; naturally, such a rise in the price of a commodity so intimately associated with the prosperity of the country is always a consummation devoutly to be wished, but unfortunately nothing in existing conditions appears to favour its realization.

Below we give a summary of the statistical position, showing rather a heavy situation; furthermore, the demand from spinners still offers no encouragement, and in our opinion all prospect of a sustained advance must be dismissed, at any rate for the time being.

We give below the statistical position of Sakel in Egypt, as at the end of December: —

	Cantars
Stock Alexandria	1,314,000
Stock Up-Country (about)	1,170,000
Total	2,484,000

At the same date last year the stock of Sakel in Egypt was about 2,203,000.

We would add, for purposes of comparison, that exports of Sakel for the period January-August last season amounted to about 1,451,000 cantars.

Against the first January tender, dockets for 97,500 cantars were issued.

The Sakel/Uppers straddle (January-February) this week stands at 788 points, against 768 points last week and 1,456 points at this time last year.

UPPERS. The rather poor trend in New York has naturally had its influence on our market. Transactions have been few and fluctuations absolutely negligible. The demand from spinners has been only moderate.

We give below the statistical position of Ashmouni and Zagora in Egypt, as at the end of December:—

	Cantars
Stock Alexandria	1,442,000
Stock Up-Country (about)	1,620.000
Total	3,062,000

At the same date last year the stock of Ashmouni and Zagora in Egypt was about 3,016,000 cantars.

We would add, for purposes of comparison, that exports of Ashmouni and Zagora for the period January-August last season amounted to about 2,712,000 cantars.

These figures are fairly satisfactory and justify the expectation that, in the event of a recovery in New York or a pronounced improvement in demand, our market would immediately respond favourably.

UP-COUNTRY. There is again nothing special to report. The new Ministry has not yet taken any decision on the supposed project of limiting the acreage to the third possible, but, as we stated last week, we do not think it possible that such a decision could now be taken. We are already in mid-January, and the preparation of the land for the new crop is fairly well advanced in many districts, both in the Delta and in Upper Egypt.

Messrs. Reinhart & Co., Alexandria, in their report of 10th January, write:—

The new year brought an unexpected lively aspect to futures and spot markets.

A group of well-known speculators bought considerable quantities of March, which advanced to $28.23 at the highest. Wide publicity was given to these operations, evidently in view to encourage the public to follow the example.

The minimum level for March futures being guaranteed by the Government at $27.50 per cantar, professionals estimate that it is worth while to pay a premium on a speculative deal on which the loss is limited and on which the chances of profit extend over two months.

In spite of the above-mentioned advance for March, January remained within a few points of $27—the latter price being the Government limit for this position. Furthermore, 97,500 cantars of January dockets were emitted, of which 80,000 cantars had to be taken over by the Government, the balance having been received by the trade.

The difference of over $1 between January and March constitutes favourable hedging opportunities. Spot purchases were stimulated in consequence, but March futures weakened somewhat under the pressure of hedge selling, closing at $28.12.

Local sentiment has become quite optimistic of late and various arguments are put forward in support of the desire to see an advance in the market.

It is believed that the crop has been overestimated owing to a deficiency in arrivals from the interior of about 700,000 cantars compared to last year.

The stock of Egyptian cotton in foreign ports is said to be smaller than usual. Alexandria holds a smaller stock than last year by 316,000 cantars. 560,340 cantars are in the hands of the Egyptian Government, the details of which are as follows:—

Cantars	
236,304	Sakellaridis bought in previous seasons
98,250	,, ,, so far this season
225,750	Ashmouni bought so far this season.

This cotton is, therefore, not available for the trade at present prices. The quantities for sale will from now on decrease considerably by going to consumption and into Government hands. It is, therefore, believed that the market will shortly be able to assume an upward tendency.

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East Indian Cotton.

Third Government Cotton Forecast, 1929-30.

This forecast is based upon reports furnished by the under-mentioned provinces and states, which practically comprise the entire cotton area of India. It deals with both early and late varieties of cotton, and relates generally to conditions up to the beginning of December, 1929.

The total area sown amounts to 23,536,000 acres, as against 25,003,000 acres (revised) at this date last year, or a decrease of 6 per cent. The total estimated yield is 5,320,000 bales of 400 lbs. each, as compared with 6,132,000 bales (revised) at the corresponding date last year, or a decrease of 13 per cent.

Weather conditions have not been quite favourable, and the present condition and prospects of the crop are reported to be fair.

The detailed figures for the provinces and states are shown below (the figures for the previous years are given in the appended statement):—

Provinces and States	Area Acres (thousands)	Outturn Bales of 400 lbs each (thousands)	Yield per acre lbs
Bombay†	5,616	1,071	76
Central Provinces and Berar	5,152	1,103	86
Madras*	2,014	419	83
Punjab*	2,501	716	115
United Provinces†	930	288	124
Burma	325	67	82
Bengal*	78	21	108
Bihar and Orissa	68	13	76
Assam	44	15	136
Ajmer-Merwara	34	11	129
North-West Frontier Province	17	4	94
Delhi	3	1	133
Hyderabad	3,393	984	116
Central India	1,348	242	72
Baroda	746	138	74
Gwalior	661	98	59
Rajputana	508	107	84
Mysore	68	22	129
Total	23,536	5,320	90

On the basis of these figures the average outturn per acre of the present crop for All-India works out to 90 lbs., as against 98 lbs. (revised) at this time last year.

A statement showing the present estimates of area and yield according to the recognized trade descriptions of cotton, as compared with those of the preceding year, is given below:—

Descriptions of Cotton	Acres (thousands)		Bales (thousands)	
	1929–30	1928–29	1929–30	1928–29
Oomras:				
Khandesh	1,350	1,345	246	306
Central India	2,009	1,898	340	*348
Barsi and Nagar† .. Hyderabad Gaorani ..	3,515	3,869	988	*1,086
Berar	3,423	3,380	700	874
Central Provinces	1,729	1,550	403	380
Total	12,026	12,042	2,677	*2,994
Dholleras	1,592	2,839	280	781
Bengal-Sind .				
United Provinces	930	708	288	254
Rajputana	542	*517	118	*142
Sind-Punjab	2,014	2,100	581	491
Others	75	83	15	16
Total	3,561	*3,408	1,002	*903
American .				
Punjab	808	919	217	167
Sind	19	24	4	5
Total	827	943	221	172
Broach	1,268	1,134	274	276
Coompta-Dharwars	1,462	1,610	287	351
Westerns and Northerns	1,262	1,539	178	*264
Cocanadas	198	226	38	*43
Tinnevellies	335	366	90	98
Salems	203	153	33	29
Cambodias	342	273	137	120
Comillas, Burmas and other sorts ..	460	470	103	101
Grand total	23,536	*25,003	5,320	*6,132

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* Revised. † Includes the whole of cotton grown in the non-Government areas of Hyderabad.

INDIAN COTTON CONSUMED IN MILLS IN INDIA, DURING THE MONTH OF OCTOBER, 1929.

(In bales of 400 lbs.)

Compiled from a statement issued by the Indian Central Cotton Committee. Based on Returns made under the Indian Cotton Cess Act, 1923.

	Consumption			
	During October 1929	During the corresponding month last year	Since September, 1, 1929	During the corresponding period last year
British India :				
Bombay Presidency	120,074	71,877	224,104	109,154
Madras Presidency..	17,834	16,265	35,330	31,331
United Provinces	18,445	14,444	36,320	28,507
Central Provinces and Berar ..	9,856	9,969	20,209	19,318
Bengal	7,241	5,906	14,845	10,759
Punjab and Delhi	5,723	5,187	11,430	9,291
Rest of British India	1,997	1,725	3,572	3,257
Total for British India ..	181,170	125,373	345,810	211,617
Indian States :				
Hyderabad	1,522	1,401	3,101	2,822
Mysore	3,765	3,503	7,440	7,062
Baroda	4,485	4,155	8,413	7,956
Gwalior	3,715	3,089	7,021	5,906
Indore	7,075	6,305	13,479	11,653
Other Indian States (calculated from yarn production) ..	5,044	4,738	9,914	9,031
Total for Indian States ..	25,606	23,191	49,368	44,430
Loose Cotton Computed to Bales of 400 lbs. :				
Bombay	200	91	327	606
Madras	3,062	2,241	7,458	7,210
United Provinces	1,543	2,303	1,745	3,380
Central Provinces and Berar ..	101	39	137	379
Punjab	371	417	773	689
Total Loose Cotton	5,277	5,091	10,440	12,264
Grand total	212,053	153,654	405,618	268,311

EAST INDIAN COTTON.

Messrs. Volkart Brothers, Winterthur, issued the following estimate as per 11th January:—

ESTIMATE OF EAST INDIAN COTTON CROP 1929-30 AND COMPARISON WITH 1928-29 (in bales of 400 lbs.).

	1929-30 Bales		1928-29 Bales
Production	6,430,000	...	6,980,000
Carry-over from previous season ...	1,156,000	...	1,103,000
Total supply	7,586,000	...	8,083,000

	1929-30 Bales		1928-29 Bales
Domestic consumption	750,000	...	750,000
Allowance for destruction	20,000	...	50,000
Indian mill requirements	2,200,000	..	1,990,000
Indian requirements	2,970,000	...	2,790,000
Balance available for export and carry-over into next season	4,616,000	..	5,293,000

Arrivals are still in excess of the offtake, as is shown by the following comparison:—

1st September to date :—

	1929-30 Bales		1928-29 Bales
Arrivals in Bombay	1,156,000	...	904,000
Arrivals in Karachi	237,000	...	283,000
Arrivals at leading ports	1,393,000	...	1,187,000
Bombay offtake	987,000	...	944,000
Karachi exports	307,000	...	234,000
Offtake from leading ports	1,294,000	...	1,178,000
Arrivals to date exceed offtake by ...	99,000	...	9,000

Indian Cotton Situation.

Messrs Ralli Brothers issue the following statement as of 31st December:—

The feature since our last estimate (18th November) is the marked reduction of 250,000 bales in the prospective yield of the Indian crop. The monsoon was an early one; nevertheless, because the rains were very favourable and lasted a normal period, it was expected that the result of the monsoon would also be favourable, although it finished earlier than usual. But the crops were unable to withstand the lack of adequate moisture since the middle of September; consequently the earlier expectations have resulted in a disappointment. And once more we find that an early monsoon is unreliable for the crops.

This applies chiefly to the Oomras, for which we have to record a drop in our estimate of 500,000, as compared with the highest we put forward in our Stat. Circ. No. 31, 7th October (and which latter was some 100,000 below the very optimistic figures we were receiving from India at the time). Unfortunately, also, these losses affect the very higher qualities of the Oomra crop, which before the very dry winds of early November were exceptionally good. Last week, again, we had further unfavourable reports.

On the whole, our estimate of the receipts of the new crop drops about 350,000 since our estimate of the 18th November. The recent Government estimate gives an inexplicably lower figure of the yield; but on a series of years the official figure actually averages very much less than the consumption, which proves that it usually underestimates the crop.

We now estimate this season's receipts at 6,600,000, and the world supplies (including opening balance) at 9,200,000, as against our final figures for last season of 6,740,000 and 9,100,000 respectively. On the other hand we are undoubtedly tending towards a very high consumption, easily 10 per cent. over last year; and we estimate that (for the first time since 1926-27) the ratio of consumption of Indian versus American will be higher than the corresponding ratio of supplies.

On the side of the consumption, we reduce our estimate for Japan and China to 2,100,000 (instead of 2¼ millions) owing to less favourable reports from the former country; the offtake of its production must also be affected by the price of silver, which is now the lowest since November, 1902. For Europe and India together we are encouraged to maintain our seemingly optimistic anticipations of the consumption.

All the above figures are condensed in our summary of the statistical position, which we give lower down.

AMERICAN COTTON SITUATION.

There is no material alteration in the figure for American cotton. The new crop is in many districts deficient in spinning qualities; this forces spinners more on to Indians and "outsiders" (i.e., growths other than the three main crops, American, Indian and Egyptian), whose yield is about 200,000 to 250,000 more than last year. Under the circumstances, a small reduction in our estimate of 15 millions consumption seems called for, and we bring it down to 14,850,000 bales.

The above circumstances are, however, well known, and are doubtless largely discounted by the low prices to which the markets have now fallen, viz., New York futures at about 17 cents for January, 1930, and 18 cents for January, 1931.

The position of American futures may also be affected by the quantity of untenderable cotton; if the said quantity is really considerable, the technical position of the futures markets will be strengthened.

INDIAN AND AMERICAN RELATIVE POSITIONS.

Although the position of Indian is strong—very strong, as compared with American—the parity still remains exceptionally wide, because of the restricted holding power in India (while the receipts were early and have almost reached their highest), and because the reduction in the probable supplies of Indian cotton has not yet been realized.

The comparison of the statistical positions of the two crops is shown by the following summary:—

(Thousand bales)	Indian 1929/30	Indian 1928/29	American 1929/30	American 1928/29
Cotton Mill consumptions	6,750	6,000	14,650	15,000
Losses and other	350	350	200	250
Total consumption	7,100	6,350	14,850	15,250
World supplies	9,200	9,050	19,350	19,600
Gross Surplus	2,100	2,700	4,500	4,350
Needed for carryover ..	2,150	1,900	3,750	3,800
Net: Excess (+) or Shortage (-).	−50	+800	+750	+550

Taking into account the level of prices also, it is clear that Indian cotton now compares very favourably with American, especially as, with an impoverished world, the consuming public will have to be satisfied with cheaper yarns at the expense of the finer counts. Bengal/Sind/Comilla prices show record low levels, not only as to wide percentage parities but also absolutely; for Oomras, American Surats and Tinnies the said parities are almost as wide as the extraordinary percentages of November, 1926; for T.280, which represents Southern crops such as Cocanada, Westerns and Northerns, the parity is wider than the previous widest.

The unsatisfactory note in trade reports continues. Complaints are unanimous that there is no profit in spinning Americans. For Indian cotton conditions are better; in a good many sections of Western Europe it is admittedly spun at a profit.

EAST INDIAN COTTON ESTIMATES

(IN THOUSANDS)

SEASON: September-August (bales of 400 lbs.).	1929-30 Present	1929-30 Previous	1928-29 Final	1927-28 Final	1926-27 Final
RECEIPTS:					
Oomras	2,800	3,000	3,320	2,700	2,321
Dhollerah	340	405	260	420	328
Bengal/Sind	1,320	1,300	1,173	1,050	884
American Surats	520	500	448	402	472
Broach/Surti	420	450	337	400	386
Coompta/Dharwar	330	360	320	220	188
Western/Northern	335	375	340	260	190
Cocanada	50	50	48	45	52
Tinnevelly	225	250	238	210	183
Cambodia	150	150	157	116	98
Comilla styles	30	30	27	41	46
Rangoon and sundries	70	70	70	73	70
Total (including the Opening Balance in India)	6,590	6,940	6,738	5,937	5,218
Handlooms, etc.	750	750	750	750	750
	7,340	7,690	7,488	6,687	5,968
SUPPLIES from India:					
Of which Opening Balance in India ..	772	890	957	348	398
YIELD:					
Our Estimate	6,568	6,800	6,531	6,339	5,570
Government's	5,320		5,638	5,871	4,973
ACREAGE: Estimate of final	23,536		25,874	26,000	25,500

DISTRIBUTION.					
Europe, etc.	2,000	2,000	1,730	1,526	958
Japan and China	2,100	2,250	2,205	1,653	1,842
Indian Mills	2,250	2,250	2,031	1,801	2,070
Handlooms, etc	750	750	750	750	750
TOTAL TAKINGS	7,100	7,250	6,716	5,730	5,620
Supplies, as above	7,370	7,690	7,488	6,687	5,968
CLOSING SURPLUS IN INDIA	270	440	772	957	348
ESTIMATED WORLD SUPPLIES (including carryover, visible and invisible)					
Opening	2,650	2,700	2,550	1,750	2,350
Yield	6,550	6,800	6,530	6,340	5,570
Total	9,200	9,500	9,080	8,090	7,920
MILL CONSUMPTIONS based on those of THE INTERNATIONAL COTTON FEDERATION.					
Europe, etc			1,380	1,105	953
Japan, China, etc			1,958	1,560	2,015
Indian Mills			1,907	1,830	2,160
ACTUAL BALES (excluding Indian Handlooms, etc)			5,245	4,495	5,128
Add for Handlooms and weight basis			825	825	825
Sundry consumptions and losses			350	200	200
TOTAL CONSUMPTION in bales of 400 lbs.	–	7,100	6,420	5,520	6,153
INDIAN versus AMERICAN, calculating Indian basis bales, American actual bales.					
Ratios of consumption	47·8%	48·3%	41·2%	35·5%	38·6%
Ratios of supplies*	45·2%	47·3%	46·1%	38·6%	30·8%

* Net., i.e., after deducting necessary carryover, Indian 30%, American 25% of consumption.

NEW COTTON SEED FARM.

The leader of the commercial community in Indore, Sir Sarupchandji Hukamchand, is to organize a model seed farm for the production and distribution of the new variety of Malvi cotton which has been developed at the Institute of Plant Industry, Indore. The State is giving him land and all such facilities as are necessary to bring the farm into existence at an early date. This seed farm will be provided with a special ginnery at which only the new variety of cotton will be handled. In this way, the supply of pure seed will be safeguarded, and it is anticipated that very rapid results will be obtained in replacing the present inferior cotton in Malwa by a superior type.

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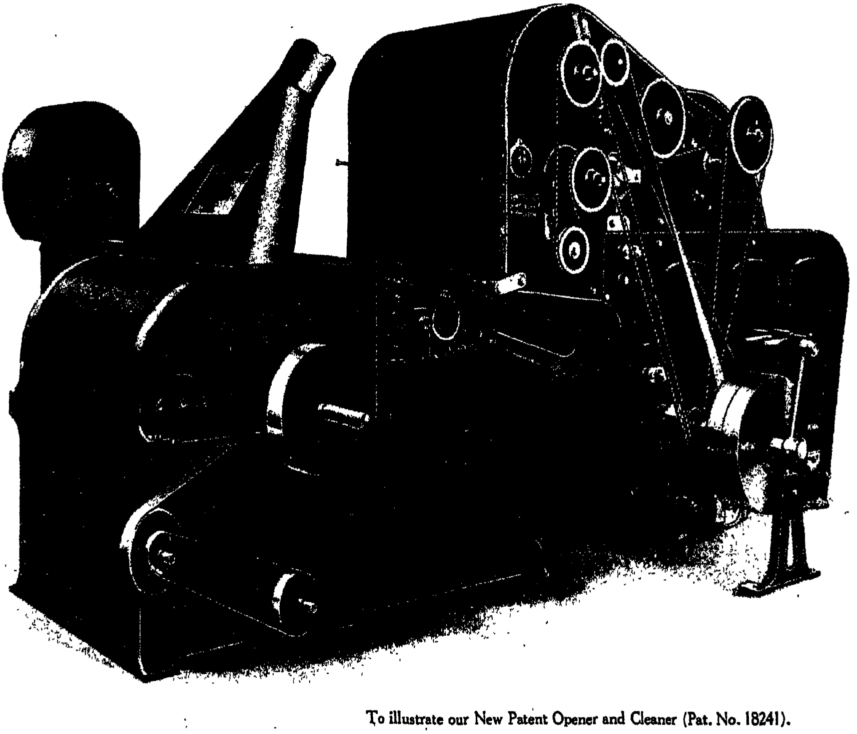

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Spindle Speeds, Spindles per Operative, Long Draft Humidity, Oil Stains, etc. Actual Experience in U.S.A.

The National Association of Cotton Manufacturers at Boston, Mass., at its meeting on November 14, 1929, dealt with the above highly interesting subjects. Our report is extracted from the *Textile World.*

When asked what spindle speeds were being used, the following figures were given respectively by three spinners for 40's combed yarn : for $1\frac{3}{16}$ stock, 9,000 to 9,500; for $1\frac{1}{8}$ stock, 9,400; and for $1\frac{1}{16}$ stock, 9,200.

One spinner stated that on the latest model tape-driven frame he is running an average of 9,200 for both carded and combed, but that on the old model band-driven frame he is averaging only 8,800. Another stated that in spinning 40's carded on $1\frac{5}{8}$ in. rings he can run his spindles at 9,500, but that on $1\frac{3}{4}$ in. rings he has to reduce his speed. A similar difference due to the ring was reported by another spinner, who stated that on the same count and length of stock he can run about 8,700 with the $1\frac{3}{4}$ in. ring and 9,200 with the $1\frac{5}{8}$ in. ring.

Spindles per Operative.—The number of spindles per operative was the next topic discussed. It was agreed that this depends principally on whether or not the spinner is obliged to creel her own roving and do her own cleaning. One speaker, from a mill in which the spinner does all the work, stated that 10 sides is the limit. Another stated that in his mill, in which the spinners only creel the roving and piece up the ends, 18 sides are run on 40's yarn; the cleaning is done by a frame cleaner. Other reports on sides or spindles per operative may be summarized as follows :—

1,248 spindles—spinners do all work above rail.

20 sides—spinners clean and take care of the rail and guides, and pass the boards; cleaners do rest of work.

20 sides of warp, 17 or 18 sides of filling—about 120 spindles per side on filling, and 2,400 to 2,500 spindles on warp; spinners creel; cleaners oil and clean rail and beams.

24 sides—112 spindles to side, 2,688 spindles to operative; spinners put in roving, pass the board, and clean rods and thread guides; 46 breaks per 1,000.

20 sides—204 spindles to frame; spinners put in roving, pass the board, and pick the top clearers four times a day; one cleaner for 30 frames cleans all top rolls and picks top clearer first thing in the morning, and twice a week cleans the creels, top and bottom; sweepers oil rollers every day; spinners put in roving and piece up ends; spindle speed for 28's yarn from 4.40-hank roving is 8,600; 40 breaks per 1,000 per hour.

It was found that nearly 50 per cent. of the mills represented at the meeting are using more than 17 sides of spinning per operative. Several speakers recommend the use of the nomograph published on page 51 of the August 24 issue of *Textile World* as an excellent basis for determining the number of spindles an operative can handle. A copy of the chart and the article describing it was passed around to those in attendance.

The question was raised as to what effect frequent changing of counts would have on the multi-side system. One speaker declared that he can keep his sides per spinner constant except on very coarse numbers. " The spinner," he remarked, " cannot run the full 2,000 or 2,200 spindles when we are using 2¼ to the square, slack twist. On anything from 30's up they can run 2,200 spindles. On 80's to 120's they can run about 2,500." He explained that when, say, his frames had been spinning 40's and he suddenly received an order for 20's, he would try to balance the work so that a spinner would not have all 20's, but would have some fine work to compensate for the 20's.

Doffing and Cleaning Gangs.—This same speaker explained a unique doffing and cleaning system in operation at his mill. " We have 10 or 12 girls who doff the frame," he said. " They clean the entire frame while it is being doffed, and it is not cleaned again until it doffs again. We did this to eliminate bunches caused by cleaning while the frame was running. By doing this we did away with cleaners. The spinners are doing the actual spinning, putting in roving and piecing up their ends, passing their thread boards four times a day, and cleaning their own rolls. We could not find a system that would work out well where the rolls are being cleaned while the frames are stopped. It takes our doffers 2¼ to 3 minutes to doff and clean a frame. The time taken depends on the gang. We have different gangs in different sections, and where we have a long section, we have 12 doffers to a gang, and where there are fewer frames to a section, there are only 10. There are 116 frames in the room where we have the 12 girls doffing. That room produces on an average 22,000 to 25,000 lbs. a week.

Spindle Speeds.—" We are running anywhere from 20's to 140's. Spindle speeds vary according to the count, of course. You cannot run all counts at the same spindle speed. We run our 20's, soft twist, about 2¼ to the square, around 5,500. When we get up to the 40's, 50's, 60's and 70's yarn, we run a speed of about 8,900. On our finer counts where we have a warp twist, we run 10,000 but we have very little of it. Most of our fine-count spinning is soft twist, and we keep around the standard 9,000 turns."

Uses Three Gangs.—Someone asked this speaker as to what happens when the frames are all ready to doff at the same time under his system of doffing gangs?

" We have three gangs of doffers," he replied. " All the frames are not ready to be doffed at the same time. If we see in one of our rooms that we are going to have a lot of frames come up together, we take a gang out of the other room until we are caught up, and later in the day they may have to help the other fellow. We have three gangs to doff about 86,000 spindles, and we have to shift those three gangs around.

" There are times when all the frames do come up practically all together, but it can be straightened out. Sometimes we have to start doffing 15 or 20 minutes before it is time to doff. There are 12 girls and a boss doffer, who runs the gang, and he has charge of keeping the frames going. This is his job. If he does not keep the frames going, we have to follow him up. But it is a case of shifting the gangs around to take care of the frames as they come up. We do have, at times, some frames stopped, but for a very short time, because the speed at which the gang works does not permit the frames to be stopped for any length of time."

Another spinner inquired as to how his gang pieces up the frame after it is doffed?

" The girls have a little basket strapped around their waist on a little belt," the speaker replied. " They go to the end of the frame and pick the bobbins out of the boxes at the end of the frame. They put enough bobbins in their baskets to doff their section of the frame. Then they go in and doff; and afterwards do the cleaning, piece up their ends, and leave the frame. Each one pieces up the number of spindles she doffs. If any girl gets behind, the boss doffer helps her out and keeps them all together all the time. One girl may have a lot of ends down, or she may be a little slower than the others. The boss doffer is not counted in the 12."

Humidity, Oil, and Coverings.—In discussing humidity several of the spinners were of the opinion that 45 or 50 per cent. is better than 60 or 65 per cent. Others, who stated that they are using the central-station type of humidifier, declared that they are running 65 per cent. A vote showed that two of those present are running 45 per cent.; eight, 50 per cent.; 15, 55 per cent.: nine, 60 per cent.; and 13, 65 per cent.

The matter of preventing oil stains at the spinning frame was discussed. One spinner stated that he uses a little flannel between the middle and back rolls that absorbs the oil and prevents its running on the roll. He uses a non-fluid oil on the front roll. Another puts vaseline on each end and in the centre of the rolls, and stated that it lasts for a considerable time and affords sufficient lubrication. Several stated that they use the non-fluid oils.

In discussing roll coverings, many expressed themselves as in favour of cork. It was stated that the cork composition used to-day is much better than that which was originally introduced to the industry.

With reference to the Casablancas long-drafting system, it was stated that roll coverings of black calfskin, sheepskin, and cork are giving satisfactory results, even with hard twists. One spinner said that he is trying cork rolls in the middle and back, and black calfskin in the front, with the idea that the cork rolls will wear for a long time.

End-breakage tests formed an interesting part of the discussion. Some speakers stated that they ran continual tests; others that they conducted them monthly or weekly; and others that they conducted them only at irregular intervals. As to the percentage of ends down which are classed as being of unknown cause, one man reported 30 to 60 per cent.; another, 20 to 25 per cent.; a third, 60 per cent.; and a fourth, 77 per cent.

The following breakages per 1,000 spindles per hour were reported by various speakers : 35 on 22's carded, $1\frac{1}{16}$-in. stock; 45 to 50 on 40's warp (filling a little higher); 8 to 15 on 14's warp; less than 30 on 40's combed; 11 on 36's, 2.50 to the square; 16 on 40's warp.

One- and Two-Flanged Rings.—Considerable difference of opinion was found on the question of whether two-flanged rings are more desirable than one-flanged. One speaker stated that he had used $1\frac{3}{8}$ double-flanged rings for 12 years, had turned them over five years ago, and now finds them still in good condition. These rings were on three-lug holders, and in turning them he did not break over one or two per frame on an average. Others reported that with 2-in. rings on three-lug holders, when the rings were put back it was impossible to get them to bear on all three lugs. Another stated that he had no trouble in turning the 2-in. rings when he took them out with a fine screwdriver. One spinner remarked that turning the rings is not satisfactory when inexperienced help is used.

Long Drafting.—In the lengthy discussion of long drafting nothing particularly new was brought out. Some were more or less dissatisfied with their installations; others were highly pleased. Mention was made of the increased dirt resulting and the necessity for taking care of it. Some find that long drafting gives a lower breaking strength; others, that it gives a higher. The principal advantage stressed was the elimination of a card-room process.

It was found that 11 out of the 57 mills represented at the meeting are using long draft.

Drafts on the Le Blan-Roth and Casablancas systems ranging from 18 to 25 were reported. One spinner stated that he has 50,000 spindles making 60's yarn with a draft of 23.75. Another reported that he is successfully running 40's slack-twist broadcloth on long draft with four to the square; and another that he is running 3·80 to the square with three-hank roving.

It was recommended by one spinner that mills having trouble with cockled yarn in their long drafting should adopt cork rolls. Another recommended that for at least the Casablancas system the twist in the roving should be as small as it is possible to have it. Correcting twist and maintaining proper tension in the card room, he said, will prevent the variation in breaking strength of the yarn which some spinners experience.

Pounds to the Grain.—One spinner had a suggestion to make in regard to expressing breakage in terms which would afford means for comparison. "How do you know exactly what yarn is referred to?" he asked. "Why not call the break so many lbs. to the grain that it weighs? Then you know what you are talking about."

This suggestion won the approval of another speaker. "If this system could be adopted of multiplying the break times the actual size," he said, "you will have a standard figure to work on. The lighter your yarn, of course, the higher number and the lower your breakage will be, but multiply them together and they will average up. We are figuring all our breaks on a break constant. We cannot always spin exactly on the number. We are likely to be anywhere from one to two on either side. If you will multiply your break times your size, you will get a break constant that will always tell you the truth. If you can get a break constant around 1,700 or 1,800, which means about 60 lb. per break on 28½, or something like that, then you can go either side of that, but you will still stay around 1,700 or 1,800. Of course, one number will make quite a variation in the constant, but it will give you a very fair way of comparison."

Spinning to Count.— The oft-debated question of how close it is possible to spin to a given number was raised at the meeting. One stated that a half number either side should be maintained, adding that he would "like to keep filling about two or three numbers lighter and give the benefit to the work."

Some large purchasers, it was pointed out, are insisting on a tolerance of plus or minus 3 per cent., which requires spinning very closely. It means that the yarn must be uniformly conditioned before testing. The effect of such processes as mercerizing, bleaching, and gassing on yarn count after spinning was brought up, but it was felt that the question under consideration pertained more to a spinner's ability to approach the number he is ordered to spin. One speaker felt that a man should be able to spin within 5 per cent. of the number; another, that 10 per cent. was close enough. Tire-fabric mills complained that they are required to spin within 1 per cent., and sometimes within 0.5 per cent.

Warp Wind vs. Filling Wind.—The next discussion was on the relative merits of a warp wind and filling wind. Some of the comments may be abstracted as follows: "A good warp wind will give you more yards."—"I prefer filling wind for very soft twist."—"On the automatic spooler you cannot use filling wind."—"You can spool cheaper from filling wind."—"I beg to differ; on warp wind I do not see why you cannot run just as fast on the spooling if you have the right kind of wind."

One speaker discussed the application of the two winds to his automatic spooling in some detail. He said: "We have pulled off 1,200 yds. a minute. That is what the machine builders advocate. I can spool filling wind at 620 with it running very well, but it is not saving anything in the spooling, except that you get about 6 per cent. more yarn on a filling bobbin because your barrel is smaller and you can run your bobbin longer. We changed from a 7½-in bobbin to 8½, and from a diameter of $\frac{13}{16}$ down to ½. We use the same size of ring. Naturally, we got more yarn on a bobbin and that is where the saving comes in.

"In the spinning, it runs 50 per cent. better. That is another thing to consider. You save about 22 per cent. on waste, because when the warp bobbin is snarled up on the top, you have got to cut it off, while on the filling wind you can pull it off and save the biggest part of the yarn.

"Another thing about filling wind on spoolers: it throws out an awful lot of dirt on carded yarn, while on warp yarn it will not do it. The seed and dirt goes up into the yarn. We have practically 70,000 warp spindles on filling wind. On 60's yarn, which we are making at the present time, it is pretty hard to spool with a warp wind unless you cut your spindle speed on the spooler down very low; down to about 500. On filling yarn we run 1,250. On 40's we are running 1,470. That is the experience I have had with filling wind. The work runs much better and you save on the package. You gain about 4 lbs. to each box of yarn of 232 bobbins, which does not cost so much for spooling."

Another speaker stated that he is spinning 40's yarn and is spooling it on both warp and filling wind. "The spooler spindles are running about 1,300 or 1,320," he said, "and from actual tests I can get about 5 per cent. more

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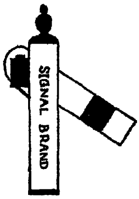

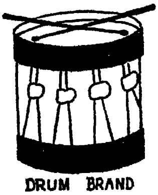

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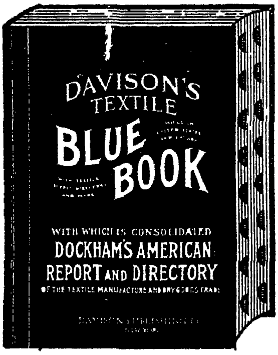

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on my warp-wound bobbins than on the filling. Of course, other conditions are the same—the same rings and bobbins."

A spinner making 28's said he found that in the spooler the warp wind runs better. "There is less breakage at the spoolers," he said, "and we get an even tension at the spoolers."

A contrary opinion was held by another speaker. "It makes a big difference what kind of a tension device you have," he said. "We have found from experience that our finer yarns do not break as much on the filling wind as on the warp wind. On the coarser numbers it does not make any difference. We are spooling 60's yarn and running our winding spindles 1,150 to 1,200 r.p.m. You cannot do that on warp wind, and the spooler tender has to have at least 180 spindles on warp wind against 90 on filling wind for the same number of yarn; so there is a good 50 per cent. of spooling saved."

"On filling wind," said another spinner, "you can run your frames a little bit faster; there is no question about that. Your traveller does not drag so hard on the filling wind as on the warp wind. When we changed from filling wind, we changed from 7½-in. bobbins, 6¼-in. traverse, to 8¼-in. bobbins, and some go as high as 10 and 12 if the spindles are long enough."

There was some discussion as to the best wire to use in automatic strippers for card-room bobbins. One speaker complained that he is having trouble with fuzz being left on the bobbins. Another said he had eliminated this trouble by using a special short-toothed wire with hardened points, numbering about 110, and by properly adjusting the straps. He suggested that possibly the straps were not tight enough on the machine which was giving the trouble.

Another speaker stated that he had overcome fuzz by sharpening his hardened wire a little oftener with an old piece of broken emery wheel. Another stated that he used the same procedure; and still another said that he is using a square grindstone, placing it next to the bar without removing the apron.

It was stated that the strippers can be run to handle 70 bobbins per minute when a special brake made by the machine builder is employed.

Facts and Figures Favour Automatic Looms.

Very useful figures were given at a recent meeting in Blackburn by Mr. M. Proctor Gregg, a director of the British Northrop Loom Co., which are based on many years' actual observations, and, whilst we may allow some discount due to the perhaps biassed position of the author, yet the final results are so overwhelmingly in favour of automatic looms that they will compel careful attention by all engaged in the weaving of cloth. The author said in part:

"I have been at some pains to obtain statistics of the times taken by weavers to perform various operations both in this country and abroad, both on ordinary and automatic looms, and the results at any rate enable some comparisons to be drawn. Perhaps the most startling thing is the enormous variation in times for the same job on ordinary looms compared to automatics. Consider the ordinary four-loom weaver using mule-cops first.

It is most convenient to group the work to be done under the following heads: Weft replenishing, warp breakages, weft breakages, removing and picking cloth, fetching weft, and what one may term idle time.

Weft replenishing as an operation may be divided into two classes. Actually there are 14 operations to replenish the weft in a Lancashire loom. The first class covers all that take place with the loom stopped, and the second with the loom running. They are as follows: (1) stop the loom,

(2) release the brake, (3) push the sley back, (4) withdraw the shuttle, (5) put the spare shuttle in the box, and (6) start the loom. These form the first class, and on an average take about four seconds to perform. Incidentally, the shuttle-changing loom stops just four seconds to perform these operations, so that there is no increase in production, though there is undoubted labour saving. The bobbin-changer, of course, does not stop. The second class of operations is performed while the loom is running, and includes: (7) Pick-up empty shuttle, (8) pull out the shuttle tongue, (9) remove the waste or paper tube, (10) skewer a new cop, (11) pull off a sufficient length of weft, (12) push back the shuttle tongue, (13) suck the weft through the eye or thread it up, and (14) put the shuttle on its stand, or in the battery in the case of a shuttle-changing loom.

These eight operations take on an average about 11 seconds to perform, and are not carried out automatically by a shuttle-changing loom. The figures vary, of course, from six seconds to as much as 14 seconds with paste-bottom cops, but the average is 11 seconds with these, and two or three seconds less, say eight seconds, with through paper tubes. So it takes about 15 seconds of a weaver's time each time the weft has to be replenished.

WARP AND WEFT BREAKAGES.

The next work to be performed by a weaver is in repairing warp breakages. Here the figures obtained on ordinary looms vary enormously, both in time and number. Records show anything from 15 seconds to 120; but an average of a number of different weavers in five mills in this country and three abroad works out at about 45 seconds, which, more or less, agrees with the Shirley Institute's figures. For weft breakages on ordinary looms it is even more difficult to strike a fair average, as the times vary anything from 10 seconds to 40 seconds from one weft break to the next for the same operative. An average of 20 seconds, however, may be taken for comparison purposes.

For removing and picking cloth it is impossible to do more than suggest an average. To take an 80-yard cut off the roller, about five minutes may be assumed as an average, and the picking of it may be done in many different ways and times, say from 20 minutes or half an hour, including the other work she has to perform in between, up to one and a half or even two hours. This, of course, depends on the last item, which is termed ' idle time,' and to arrive at this we must consider what time is ' occupied ' per hour.

REPAIRING BREAKAGES.

A weaver on four looms with cops lasting, say, six minutes, will have to reshuttle 40 times per hour, which will take ten minutes of her time. Supposing there are three warp breakages per hour, which is an average figure, then they will occupy two and a quarter minutes of her time. Supposing two weft breaks, she will take, say, three-quarters of a minute to repair them. She will have two cuts of cloth per days to remove, so we can allow one and a half minutes per hour for this, and say 10 minutes for picking it. For ' fetching weft ' we must assume again that she requires to carry, say, four boxes with 80 cops each during the day, for which we can allow about two and a half minutes in the hour. This brings the total time actually occupied on performing the above manual operations up to 27 minutes, or about seven minutes per loom.

There are two interesting observations to be made on this figure. In the first place, a very small proportion is spent actually in ' weaving cloth '—it is only 13 minutes, or less than half; and, in the second place, the operative is working far more than the 27 minutes in each hour shown on paper. How is this so-called ' idle time ' made up? Allowing ten minutes per hour for ' personal ' time, the remaining 23 minutes is almost entirely made up by mental anxiety, watching for faults, looking for trouble. It is this which makes a weaver's job so unattractive to-day, and prevents her from looking after more than four looms. If the cloth is faulty she is hauled into the warehouse and probably discharged.

ANALYSING STOPPAGES.

We have already seen that the old shuttle-changer only saves the actual changing of the shuttle, not the replenishing of it; but that it stops just as long as the ordinary loom to do it, and therefore gains nothing in production, so that it is what may be

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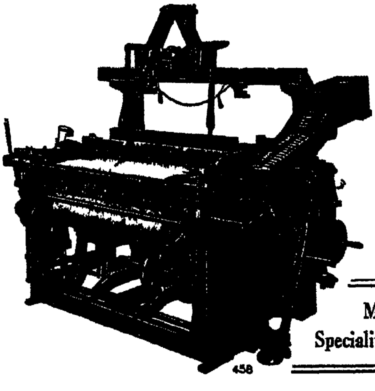

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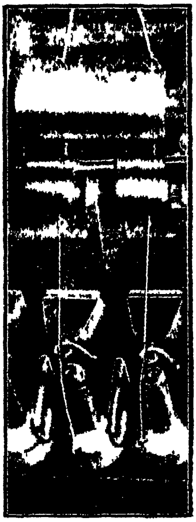

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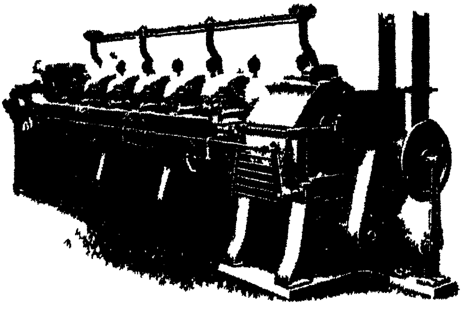

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termed only semi-automatic; we will therefore confine ourselves to the fully automatic bobbin-changing loom, which saves all the labour, and the time as well. An analysis of the numbers and times of operation is as follows: Reshuttling, as we have already seen, is nil. Battery filling is not a weaver's work, and will therefore be considered separately. For warp breakages, covering also pull-backs, loose ends, knots, etc., a rather high average which is fair to this country, but considerably higher than in the United States, for instance, is 1·005 per loom per hour, each stop being 0·699 of a minute on the average. Weft breakages, including pick-finding, etc., amount to 0·705 per loom per hour, each stop lasting 0·793 of a minute.

Other stoppages average 0·373 and last 0·230 minutes each. This makes a total of 2·083 stops per loom per hour, and 1·722 minutes time spent on them. These are actual tests, and the average in America is often only half a stop per hour, which shows how conditions must change if we are to make automatics a success in England.

The time spent by a weaver on an automatic is only 1·722 minutes, compared with seven minutes on an ordinary loom. As no time is needed to watch for faulty cloth, fully 40 minutes can be spent in each hour on the above operations; and an operative therefore can attend on the above figures to 40 divided by 1·722, or 23·25—say 24 looms. The remaining 20 minutes in the hour can be spent in 10 for 'personal' time and 10 for 'general supervision.'

On an ordinary loom the time spent by the weaver is seven minutes, and the time lost by the loom is 13 minutes in the hour. On the automatic the time spent by the operative is only 1·7 minutes and the time lost by the loom is only 4·58 minutes.

BATTERY FILLING.

The weft carrying for the automatic loom is usually referred to as 'battery filling.' This work is best performed by separate operatives, for classification applies to the work to be performed just as much as to the yarns and cloths.

'Battery filling' on a shuttle-changing loom involves the second operation of reshuttling as well as actually putting the shuttles in the magazine, and this operation takes 11 seconds on an average per shuttle. The magazine holds eight shuttles, and the supply of weft is therefore enough for about three-quarters of an hour with a six-minute cop. The battery filler on shuttle-changers will have to go to each loom about once every half-hour, and it will take her between one and two minutes on each occasion. She will therefore be limited to attending about 30 looms, and she will have to be more or less 'skilled,' that is an expert at 'skewering,' which will mean a higher wage than for the unskilled work of putting bobbins in a bobbin-changing battery.

The battery in the bobbin-changer holds 24 ring bobbins, which is sufficient for nearly two and a half hours supply of weft. The operative only need go to the loom say once every two hours, and it only takes her two minutes to fill the battery. She can therefore easily attend to 60 bobbin-changing looms. Actually, the average of the numbers in practice is about 20 shuttle-changing and 48 bobbin-changing looms per operative.

The automatic overlooker should be a mechanic with definite information of given conditions, and he should set every loom not only correctly but alike. His work will therefore become much more automatic as well; but it means a whole change of outlook, and he will have to share the new and single common incentive of keeping all his looms running all the time.

LOOM DRIVE.

In connection with construction the question of 'drive' should be considered. All automatic machinery must have a uniform and steady drive, and once again the automatic loom is no exception. I am not going to argue in favour of individual electric drives, which, for a new shed particularly, are undoubtedly the best for automatics. But an important point is that the motor should in all cases be running continuously, and the loom started and stopped independently by a clutch. Loom clutches are now common on automatic looms, and on heavy or wide looms are geared into the driving wheels. The motor can be connected to the clutch pulley by a belt or by gears. The day of sliding belts on fast and loose pulleys is definitely over. The cost of the clutches is infinitesimal compared with [illegible] loom and the better results obtained, and the cost of the motors can [illegible] be compensated for by the lighter construction of a new shed where [illegible] shafting is required

COST

The next aspect is the financial one. It is safe to say that when the expensive automatics are run as they should be that is where automatic methods are installed as well as machines, then the saving in wages alone will yield a handsome return on the outlay

Compare a few of the figures on the smallest economic unit of looms possible namely an overlooker's set say 80 looms The ordinary looms will run faster, say 220 with four looms per weaver and an efficiency of say 70 per cent The Northrops will only run at 175, but an operative will easily mind 20 of them, and obtain at least 90 per cent efficiency The wages per loom per week will be reduced from about 11s 4d to 3s 2d , even though the Northrop weaver is paid, say, 52s against 42s The production per weaver per week will be increased from 820 yards to 4 200 yards The saving in wages per week will be £26 and the weaving cost per piece reduced from 7s 8d to 3s 1½d

The extra capital employed will be about £3,500 In addition there is an increased production of 20 000 yards a year with the automatics An operative should mind at least 48 looms on printers or such cloths as sateens, say a 98 by 50 with 20's weft and 16's warp

The aims and objects of the automatic loom are increased production, reduced cost and improved working conditions for the operatives "

THE VALENTIN AUTOMATIC WEFT-REPLENISHING DEVICE.

A new weft-replenishing device has recently been placed on the market by the firm of Carl Valentin, Stuttgart, Germany It is claimed that this attachment converts any standard single-shuttle loom into an automatic loom irrespective of whether the loom is an over-pick or an under-pick loom, or whether the loom is fitted with a fast or a loose reed According to the manufacturer, this weft-replenishing device enables one weaver to attend to 16 looms instead of four ordinary looms Converted looms running at 180 picks per minute are said to show an efficiency of 90 to 95 per cent, providing that the yarn is of good quality

The special advantages of this automatic device claimed by the makers are —

1 The purchase price is only a fraction of the cost of a complete new automatic loom Even when used with ordinary new weaving looms, the Valentin automatic weft-replenishing device means considerable economy, as compared with a complete automatic loom of another system
2 The Valentin automatic weft-replenishing device produces faultless material
3 The Valentin automatic weft-replenishing device is so simple and easy to overlook that even foremen and weavers who are not technically trained can use it with success
4 The staff and the operatives have no need to make themselves acquainted with a new construction of loom
5 The fixing of the Valentin automatic weft-replenishing device is so simple that after a short instruction the weavers can fix it themselves

THE TOYODA LOOM.

A description of their Japanese Automatic loom was given in the General Secretary's "Report on the Cotton Industry in Japan and China." Members will be interested to learn that Messrs Platt Brothers Ltd., Hartford Works, Oldham, have now an actual loom working in their show rooms, where it has already been inspected and favourably commented on by many visitors. The loom exhibited has a 42 inch reed space and is weaving a typical plain cloth from rewound weft at a speed of 215 picks per minute.

IMPROVED WARP STOP MOTION.

The Draper Corporation have introduced a patent sliding bar warp stop motion that reduces the time required to tie in a broken end.

With this new device, the warp is spread open at the place where the end is down. There is no time lost in finding the broken end. There is nothing now for the weaver to do but pick up the end, tie it in and pull on the starter handle—for it must be remembered that this warp stop motion stops the loom with the shuttle in the left-hand box and everything else in proper place for starting as soon as the end is tied in.

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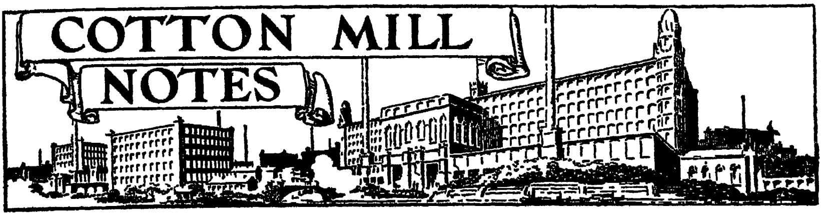

American View of the Value of New Machinery in Cotton Mills.

At the semi-annual meeting of the Southern Textile Association, held early in November, 1929, at Spartanburg, S.C., one of the subjects discussed was that of the value of new machinery. The first speaker was Mr. J. E. Sirrene, of Greenville, S.C., one of the important cotton engineering consultants, generally called "mill doctors," of the South, who has had a large experience in investigating many mills, and as the whole discussion was of great educational value we reproduce it.

Mr. J. E. SIRRENE said: The value of new machinery to a textile plant depends on its effect on three things: increased production, decreased cost, and increased earning power for the operatives, and unless there are improvements in one or more or all of these three conditions, its purchase cannot be justified. Let us consider these three points in the order in which they have been named.

We sometimes hear people say that there has been very little change in the design of cotton-mill machinery in the last two decades, but is this true?

We have completely revolutionized the character of opening machinery, and have added to it cleaning devices as well. Pickers are now being built very largely on the one-process principle, and there are many important improvements in the design of all card-room machinery. In spinning we have gone to wider gauge, tape drive, larger rings and longer traverse. The process of spooling is being rapidly replaced with automatic spooling, or winding on large packages, and warping is now done at a speed that was formerly thought impossible. While the basic principle of weaving has not been changed, there has been a very decided improvement in the design of looms themselves.

In addition to changes in design there has been a substantial improvement in the accuracy with which machinery is built, and automatic tools have been made with parts much more nearly interchangeable. I think we can, therefore, safely say that the machinery built to-day is a great improvement over the machinery of twenty years ago, even if both were new to-day, which, of course, is not the case, and in addition to starting out with a better machine you have, as compared with the old, a better physical condition.

With all of these improvements in design and workmanship I think it will be conceded that production per unit has been increased. This increase in production naturally makes it possible for an operative to get more production per machine as well as to tend more machines, and this directly affects the cost of labour, even though the increase in the number of machines assigned to a given operative be accompanied by an increase in pay.

Of course, the introduction of new machinery into a plant must or should be accompanied by some change in operating methods, otherwise the greatest benefit from it cannot be secured.

I will mention one or two cases that came under my personal observation. One was a mill making very heavy goods, and where they were using machinery probably as good as the average old machinery in the South. They were spinning a very coarse warp yarn, and the annual production was about eight million pounds. We put in new openers and cleaners; we revamped the picker room, threw out twenty old cards and put in new ones, put in some new loading frames and all new warps, put in winding and warping, but we did not change the looms.

The result has been that now, on full-time operation, instead of eight million pounds they make eleven million pounds. They are running part of the looms at night, and we had to increase the number of looms. The cost of production was 3 cents a pound on eleven million pounds, that is, $330,000, where the total amount spent for new machinery was slightly over $400,000. In other words, they not only are working less people in the mill but everyone that is working in the mill is making more money. Their seconds were cut in half.

We had another case of what I thought was one of the best print cloth mills in the South. We were making additions, and put in some new warp spinners. We increased the length of the frame in spindles about 15 per cent. We increased the front roll speed 12½ per cent. Where they were formerly producing 87½ lbs. in a given time, they are now producing 115 lbs.—that is, an increase of 30 per cent. in production per operative. We also put in some other things, and we were able to run an additional 300 looms without any more weavers and without any other change in our system.

I think we could cite case after case, but to you, gentlemen, that might be a story. I want to come to the third thing, which to my mind is equally important, if not more so, than the other two, and that is the effect upon the earning capacity of the operative.

When automatic looms were first introduced it was soon found that in order to get full benefit from them it was necessary to make better warp yarns; perhaps not any better than should have been made before, for the non-automatic looms, but while it was advisable in one case it was necessary in the other.

In like manner. when new machinery is installed in a plant, care should be taken in the selection of the cotton, and in all preparatory processes, so that there will be fewer broken ends, and therefore less work for the operative to do to keep the machines running.

We now come to the third advantage, which is the effect on the earning capacity of the operative, and which is to my mind equally or more important than the other two.

Those of you who are in constant contact with the people who work and live in the mill villages must have in your hearts an earnest desire to see the living conditions, the welfare and the happiness of these people constantly improved, and while much has been done in the last 20 years to improve the status of the textile operatives, there is still much that can be done, and I do not believe that we shall ever have continued prosperity for the mills and the proper standard of living conditions for the operatives until we finally and definitely get this industry out of the low-wage class.

In the face of competitive conditions this will have to be accomplished slowly, but we can, at least, make some progress from day to day. I think it will be admitted by every thinking man that the most intelligent help are, in the long run, the cheapest, and in every mill village in the South there is growing up a new generation of young, active, and intelligent people who are being educated, and to whom you must look for your best and most satisfactory help. If you do not give them as good an opportunity in the textile industry as they can find in some other occupation, the best of them will drift away and only the poorest will remain.

You may ask what has this to do with the machinery. It seems to me that the answer is plain—the industrial history of the world shows most clearly that the wages are higher and the living conditions are best in those countries where the output per capita is highest. Unfortunately, some of the operatives, as well as some outsiders who are undertaking to advise them, are opposed to the principle of increasing the output per operative, on the ground that such a policy is inimical to the interest of the worker.

There could be no greater fallacy, and anyone who harbours this belief and attempts to force it on others will find in the long run that he might as well try to sweep the tide back with a broom.

Theoretically, most of the processes in a cotton mill require machine supervision rather than direct labour by the operative, and the number of machines that can be supervised by one operative will vary inversely with the number of stoppages due to breaks, either in sliver or yarn. It is, of course, presumed that any intelligent mill executive will see the necessity of giving the operatives a proper share of the value of his increased output.

I don't want anybody to think I am radical, but when you get out of the low-wage class, when you get to where you can compete with other industries, you are going to avoid what has happened in other sections of the country. I have talked to a good many men in New England, and they tell me that the standard of their help is lower and efficiency is very much lower than it was 30 years ago, or even 20, and we all know the reverse is true down here—that the standard is higher.

Now the South is going to develop more and more along industrial lines, and with it will come increased competition for help. Many of those industries have a high turnover. You have got to meet that condition, and if you allow other industries to rob you of your best help, you are bound to find yourself exactly in the position that many New England mills are in to-day, and you are the only one who can avoid it. Nobody can help you.

I know time is pressing, and I am going to close with just one more thing. If, therefore, we can equip our Southern mills with the very best of machinery, and improve our operating methods, we can hopefully look forward to an increased production per unit, an increased profit for the mill, and a higher wage for the operative.

Mr. J. D. JONES, Union, S.C., said in part: In as brief and concise a manner as possible let us discuss for a few minutes some of the recent developments in new machinery for the different departments. " True economy begins at home," so before going to the mill, if we have a clerical force of sufficient size, let's at least ask the question: Can I use to advantage calculating machines, change list machines, slide rules, or any of the time and labour saving devices so essential to modern business?

The power, either purchased or generated, is a large item of cost. The use of pulverized fuel or modern stokers may be the means of reducing that item. If you generate your power from water, how does the efficiency of your wheels compare with those of modern design? Recent years have shown wonderful progress in this field.

MACHINE SHOP—OPENING DEPARTMENT. In the machine shop we have been slow to adopt many of the improved machines. The automatic gear cutter, modern quick-change lathes, high-speed drills and high-speed hack-saws have reduced the pay-roll or enabled the same force to accomplish more work.

In the opening department there is little, if any, opportunity for new machinery to reduce the labour cost, but the superior opening and cleaning of the horizontal cleaner has made it possible to effect savings in the picker room, due to the elimination of processes. In like manner my experience has been that the proper blending and mixing of cotton by the use of a number of feeders and a conveyor belt will more than justify the small expenditure.

PICKING AND CARDING. In the picker room the outstanding development is, of course, the single-process picker. The economy effected there is about in proportion to the number of processes eliminated. Better designed machines, more sensitive eveners, and superior workmanship combine to produce an evener, cleaner lap, which paves the way to low end breakage in future processes. Where scavenger and roving waste is being fed by hand, the use of a special feeder will almost invariably reduce the pay-roll.

Due to the nature of the process of cording, new machinery can effect but little, if any, economy, as the production is fixed by the character of the work desired. The improved methods of stripping are worthy of consideration, not only as a means of effecting a saving, but because they eliminate one of our industry's most disagreeable jobs. It is also reasonable to assume that accidents at this point will be greatly reduced.

DRAWING—SPINNING. In recent years much progress has been made in the character of work produced on the drawing. This has been largely due to a liberal reduction of front roll speeds. As in the carding process, here it is also largely a matter of quality, and replacements must be considered from that angle rather than from the possible savings.

Where maximum efficiency is expected in the spinning, the fly frames play a most vital part. No yarn can be superior to the roving from which it is made, so here is the real beginning of our final end-breakage results. The old-style hardly worn fly frames cannot produce a roving which will average less than 40 ends down per thousand spindle hours in the spinning. Likewise, the yarn spun can never be expected to pass the weave room with a loom stoppage of four, or less, per ten-hour day. Here, as perhaps in no other process, careful study and good judgment are required to determine the economical procedure.

The spinning frame of to-day is " a thing of beauty and a joy for ever " to the superintendent or overseer who is so fortunate as to possess it. Here, improvements in design, material and workmanship have combined in an unusual manner to produce a better yarn, with higher speeds and longer drafts. Larger rings and longer traverse not only give the advantages of a larger package, but reduce doffing costs.

The long-draft systems make it possible to use a coarser roving, with attendant savings in cost, and the superior drafting will often enable the spinner to produce an equal, if not superior, yarn from cheaper stock. Individual motor drives, large cylinders mounted on ball bearings, sturdy creels, tape driver, accurately cut gears, case-hardened rolls, and many other minor improvements produce a smooth running frame which can be easily and cheaply maintained.

SPOOLING AND WARPING. Changes in spooling and warping present even greater opportunities than spinning. The high-speed spooler and warper make it possible to deliver a superior warp to the weaving department at a considerable reduction in cost. Here, due to this twofold advantage, replacement appears very attractive, and is worthy of most earnest consideration. The increased yardage on high-speed warper beams will eliminate waste and produce better work at the slasher.

In the slasher room new machinery is of little moment, providing the old is in good mechanical operating condition. Attachments such as ball-bearing creels, temperature controls and tension indicators are worthy of consideration as means of delivering a constant supply of good uniform warps to the weave room.

THE AUTOMATIC LOOM. The automatic loom, from a practical operating standpoint, seems, thus far, to have pretty well resisted all efforts to make any material change in its speed. Here the mechanical condition of the loom, cost of maintenance and suitability for the cloth to be woven are the determining factors. The loom of to-day, with individual drive, large beam, improved feeler, cut gears, and other improvements too numerous to mention, is a superior machine, capable of producing a superior product, and as such must be given every consideration. One of the outstanding advantages of this new loom is the wide variety of fabrics it is capable of producing, thus broadening our potential market.

IN THE CLOTH ROOM. In the cloth room we dress up our product and send it forth to meet our customer. Competition is keen, and any reasonable expenditure in improving the appearance of the product or the package is well justified. Recent years have not brought forth any radical changes in cloth-room machinery, but there has been a constant improvement. Perhaps the shear or combination shear and brusher is receiving more consideration than any other single machine in this group. Any machine which will eliminate hanging threads on the face and selvedge of the cloth is worthy of investigation. Results here cannot be measured by savings effected, but rather by improvement in character and appearance of product, which has an intrinsic value even though intangible.

HUMIDITY A VITAL PROBLEM. Turning back, now, to view our plant as a whole, we must not overlook so vital a problem as humidity. Years ago it was only considered necessary in the weave room, but to-day it has found favour in all departments, from the picking, through the cloth room. Recent years have brought about wonderful improvements, and especially in regulating devices, which are so essential. The plant that does not have an ample supply of well-regulated humidity can seldom spend money for other purposes which will show a greater return.

In conclusion, let me say that our industry in many respects is no different from dozens of others, and this problem of "The Value of Replacing Old Machinery with New" is one which is common to us all. In judging the future we are yet to find a better guide than our experience in the past. It is a significant fact that the plants which have survived and made the best records in the past are those which we speak of as being modern, or up-to-date. We must, therefore, conclude that a machine which will not perform its work in a satisfactory manner must be revamped, replaced, or put on a suitable product. The machine which does perform its work in a satisfactory manner must be replaced when a new machine is developed which will produce a unit of work at a cost, including fixed charges, which does not exceed the cost of the same unit of work when produced on the old machine.

Mr. J. B. HARRIS, Greenwood, S.C., Vice-President, Greenwood Cotton Mills, says: Most of the successful concerns have a programme for continual improvement, replacement of equipment, and adoption of new manufacturing methods. Perhaps the time will come when some superman or a group of men may discover a remedy for the ills of the textile industry, but in my humble judgment that time has not yet arrived. Apparently the law of the survival of the fittest is still in force, and will be for some time to come. If this is true, it is up to us as key men to increase the efficiency of our plants and keep down our manufacturing costs, or we will be numbered among the weak and inefficient, who must of necessity be eliminated before any material improvement in conditions will be brought about.

OPENING AND MIXING COTTON. During the past few years a great deal of attention has been given to the proper opening and mixing of cotton, and I dare say more improvement has been made along this line in five years than in the preceding 20 years. Almost any mill that is now using old and obsolete machinery in the opening rooms can lower the grade of cotton being used and save from ½ per cent. to 1 per cent. per pound by installing new and modern opening, cleaning and picking machinery.

THE ONE-PROCESS PICKER. In my judgment, the development of the one-process picker has been one of the outstanding contributions of the machinery builders to the textile industry during the past few years. We recently installed four one-process pickers in one of our plants, replacing old equipment consisting of four breaker pickers, five intermediaries and five finishers. Four men were needed to operate the old machines. Only two are needed on the new ones. There is also a saving in power and floor space, but we think the greatest benefit derived from their use is more uniform work and better preparation of the laps.

There is not much to be said in regard to cards, drawing and roving at the present time, but we all know that as time passes these machines become older, and the quality of work and production from them becomes lower, while the upkeep on them becomes much higher.

The new spinning now being built is greatly improved over the old types, and much better results can be secured with it. We recently scrapped considerable old spinning in one of our plants, replacing it with new equipment. By putting in longer frames we were able to operate several thousand additional spindles without additional labour cost. With the increased production possible from new machines we have materially reduced our spinning cost.

LONG-DRAFT SPINNING. Since so much has been said about long-draft spinning during the past three or four years, no discussion of new machinery would be complete without giving it consideration. It is interesting to note that some of the machinery builders who did not seem to be particularly interested in long draft three years ago are now advocating its use.

The agent of a large and very successful New England mill was recently quoted as stating that, in his opinion, long-draft spinning of some type will be standard equipment throughout the major portion of the cotton industry within ten years.

That is a rather strong statement, and time alone will tell whether he is correct or not. We do know, however, that many thousands of spindles of long draft have already been installed, and that many of those using them are well pleased with the result they are getting.

We have at Greenwood about 9,000 spindles of long-draft spinning that were installed about six months ago. This equipment is on warp frames making No. 30's from 4·25 hank roving with a draft of 15·35. The yarn from these frames is about 10 per cent. stronger than the same number of yarn from our old frames made from 6·00 hand roving, with a draft of 10·77. Some additional cleaning is required on long-draft spinning, but after the spinners become accustomed to it they can tend the usual number of spindles. There is a material saving on labour cost in the card room, where it is in use, and also a saving in power and in floor space.

Automatic Spooling and Warping. About three years ago we installed the automatic spooling and warping, putting in four spoolers and three warpers. We are using only one-half as many operatives on these machines as were required for the old spoolers and warpers. These operatives earn about 25 per cent. more than they did on the old machines, but labour cost for this department was reduced about 40 per cent. While additional power is used to drive the machines, this is offset to some extent by releasing valuable floor space that was badly needed for other purposes.

After these machines were installed a decided improvement was shown in the running of our weaving, and in the quality of cloth being woven. This enabled our weavers to run more looms with less effort on their part. As a result we were able to cut out five weavers on each shift, increase the wages of those remaining, and at the same time reduce our weaving cost about 5 per cent. Those who prefer keeping their warp spinning on the filling wind can certainly secure some of these benefits by replacing their old spoolers and warpers with high-speed winders and warpers.

Improvements in Plain Looms. No radical change has been made in plain looms during the past few years, but we all know that improvements have been made on them that enable us to produce better cloth than can be produced on thousands of the old looms which are running in our Southern mills. We are now installing about 500 new looms in one of our plants, scrapping the old ones, and believe it will be a good investment for us.

In 1921 we installed a complete new humidifier system, putting in high-duty heads and automatic controls. Appreciating the benefits derived from the use of this equipment, and realizing the need of more humidity and closer control of it as our manufacturing conditions changed, we revamped the entire system last year, putting in additional heads and controls where they were needed. In my judgment we have never invested any money in new equipment on which we have secured a better return.

Good Lighting. Until comparatively recent years, the lighting system in most of our mills was looked upon simply as one of the necessary accessories of the plant. Practically any mill operator to-day who has kept abreast of mill practice believes fundamentally in good illumination. Its benefits are derived from a variety of sources, ranging all the way from reduced accident frequency to improved quality and increased production.

In the limited time which we have for discussion I have only attempted to point out a few of the many advantages which a plant equipped with modern machinery has over those with obsolete and worn-out equipment. With the right kind of equipment you can speed up the machinery, and possibly avoid unnecessary speeding up of the operatives. Good-running work will go a long way toward keeping your employees satisfied, and I am sure you will all agree with me that this is something greatly to be desired during these troublous times.

Mr. E. A. **Franks**, Superintendent, Duncan Mills, Greenville, S.C.:

Power Looms—Spinning Frames. The old power looms bear the same relation to the present-day automatic looms as the stage coach to the airplane. I am speaking of the type conceived and developed by the automatic-loom builder of to-day. Old spinning will run and will produce yarn, but to every pound it produces there is an added expense as the result of low production, and more waste in addition to a lower quality of product.

Spinning frames may look like they have many years of good service ahead of them, but if they are only producing 1½ lbs. per spindle per week, whereas new frames would produce 2 lbs. per spindle, they are 25 per cent. inefficient, and as far as the spinning is concerned it is costing 25 per cent. more than if new frames were in their place. The old frames make more waste, which means more breakage on the looms.

Mill Pays the Cost. During every hour an old frame runs the mill will pay in the way of higher cost of production and increased waste. If the exact amount could be determined and the mill treasurer had to pay that amount in actual cash at the end of each day, very few weeks would pass before new spinning frames would be in the place of the old ones. Because the loss cannot be plainly seen and is covered each week by an unnecessary amount that is part of the pay-roll, the mill manager lets the loss continue.

WHY SOME MILLS HOWL. Massachusetts howls about the 48-hour week, and yet the replacement of her old spinning frames with new ones would increase the production of her mills fully twice as much as an increase of 54 hours. *England is keeping her old spinning running, and is paying the penalty through an increased cost and the loss of her foreign trade. The plight of England and New England should be lesson enough for the cotton mills of the South.*

If your depreciation account is not available, borrow the money, and start putting your mill in order, and for Heaven's sake keep the good work up, year after year. Money spent regularly will more than pay for itself.

WHEN FIRE WAS GOOD FORTUNE. There are mills that keep on manufacturing with old and inefficient machinery, and lose both their money and reputation. Through the good fortune of a fire, one concern I read of not long ago was able to equip its mill with new and modern machinery, and has kept the quality and the production up to such a point that it has never had to curtail operation, and always makes a profit.

Old equipment is uneconomical, and the South must not suffer as has New England from the failure to replace old and antiquated machinery with that which is new and efficient.

The low price at which New England mills have been selling used machinery indicates to the thinking man that its real value is very low, else he would be willing to pay more for it. And some of this low-priced used machinery is less than 10 years old.

AVERAGE COST OF MACHINERY. The average cost per pound of textile machinery, from picking equipment through, including looms, is 18[illegible] cents per pound. It is better to replace with modern machinery bought on time, and pay interest on the debt, than to pay several times the interest through the loss of quality and production.

Machinery grows old for three reasons : obsolescence, lack of upkeep, plain old age. Old machinery runs up the cost of manufacture in every department. It is low in production, high in waste and poor in quality, increases labour cost, due to small production, and also due to limited number of machines an operative can handle.

New machinery in many cases will give 25 per cent. increase in production over machinery 20 years old. A complete reorganization of the textile industry in which many obsolete mills will find their way to the graveyard is the stimulant which would aid in the revival of the present depressed condition of the cotton-mill stock market. This will eventually come to pass, and will be of greatest benefit to the industry, in that excessive spindleage will be cut down, causing more equitable balance between capacity to produce and demand. The modern mill, with new equipment, reduced cost of production and improved quality, should be able to compete for foreign trade.

DIFFICULT TO FIND CAPITAL. It is well known that to-day it is difficult to find capital for the purchase of improved machinery, even though it will earn its cost within three, four or five years. It has often been remarked that there has been almost no improvement in textile equipment during the last decade, and there are those, apparently, who actually believe that this is true, or, at least, will believe so until they seek relief from local taxation, and have their plants appraised, or until they are compelled to liquidate, and learn of how little value in dollars and cents is the equipment which they had considered as a valuable asset.

The actual value of new equipment is difficult to determine in dollars and cents, and although the improvements in the last 20 or 30 years have been very gradual, with the comparison of new equipment to-day as against machinery 30 or 40 years old, it is very marked.

INCREASING PRODUCTION.

Mr. A. H. COTTINGHAM, Greenville, S.C. : I would like to ask if any gentlemen have replaced old spinning with new, and, if so, how many more ounces per spindle they got on the new than on the old ?

The PRESIDENT: Who has replaced old spinning with new and has some comparative figures on them?

Mr. W. W. COBB: I have replaced all my warp spinning with new tape-drive spinning, and we have increased—I haven't the figures in ounces, but we have increased our production 20 per cent.

The PRESIDENT: How many spindles did you add?

Mr. COBB: We decreased from 9,968 down to 8,640, and we are getting 20 per cent. increase over that.

The PRESIDENT: On the same hours operated?

Mr. COBB: Yes, sir—less hours operated.

The PRESIDENT: How much less?

Mr. COBB: Well, when we had the old spinning, I had to operate that old spinning extra hours in order to keep the weave room busy. Now I only run during the noon hour and run no extra hours at all.

FRONT ROLL SPEEDS.

The PRESIDENT: May I ask if you remember your front roll speeds, before and after?

Mr. COBB: Yes, sir. We ran on the old an average of 102, or we thought we were getting 102; we did not, for a fact. We had belt drive from 36 to 12, and you cannot retain a uniform speed, which you know, driving off a large pulley on to a small pulley on a short belt. We thought we were getting around 102, and now we run in summer-time 126 and in the winter-time around 122.

The PRESIDENT: Are you using the same character of cotton?

Mr. COBB: Yes, sir, practically the same.

The PRESIDENT: What do you think is the biggest improvement on that spinning frame to give you this increase?

Mr. COBB: There are three things I attribute it to. One is a wider gauge, another is the tape drive, and the third is individual motor drive. Those are the three things.

The PRESIDENT: With the wider gauge you use a filling wind?

Mr. COBB: We use filling wind, but we used it before.

The PRESIDENT: Do you use larger rings, or smaller, than before?

Mr. COBB: We were using two sizes of rings, but in the new we adopted uniformly the larger-sized rings and make the larger package.

INSTALMENT PLAN SUGGESTED.

The PRESIDENT: Everything else is bought on the instalment plan. I don't see why we can't buy textile machinery, "a dollar down and a dollar a week."

Mr. COTTINGHAM: I would like to know if any of the gentlemen have installed any of the Universal high-speed winding, and, if so, what results they are getting on any system other than the Barber-Colman.

Mr. J. Y. JONES (Newberry Cotton Mills, Newberry, S.C.): We have installed the high-speed winder and warper, and we have cut out 10 hands by this installation.

The PRESIDENT: On how many?

Mr. JONES: We had 15 spoolers before and 20 warpers. We have 10 winders and 6 warpers. We had 30 spoolers previously; now we have 25 spoolers, but we cut out one warper hand, one cleaning hand in the slasher room and two yarn men, and with a saving to the mill in the reduction of waste of somewhere between—I might say that we were making too much waste before, and maybe we are making too much now—we reduced our waste 600 or 700 lbs. a week.

THE VARIABLE-SPEED MOTOR.

Mr. STONE: There is one other thing in connection with the new spinning frame that we have, and that is a variable-speed motor. I don't' know whether anyone here has ever seen one or knows much about it, but with that variable-speed motor we have run as high as 136 average speed on the front rolls, No. 30's yarn.

Of course, the speed varies above and below that. I don't think we are running that now, but we have run it, and run it very successfully, using the same cotton—short-staple, local cotton—that was used on the other frame; but that is a feature of the drive that Mr. Jones did not speak about. I don't know whether he knew about it, but there is a variable-speed motor in operation that we will hear more about in the future, and I would say that anybody that is putting in direct-driven frames should consider that.

The **PRESIDENT**: Do you feel that the cost of this motor is more than offset by the results you get from it, or are you able to express an opinion on that?

Mr. **STONE**: I am not able to say just how much more it cost. The motor was put in on trial by the General Electric Company. It is in the experimental stage in this country, but it is being used a great deal.

Mr. **FOX**: Would you let an electrical man talk on that? The first variable-speed spinning put in in the South was by what is now the Poinsett Mills in Greenville. I installed five motors there on a test, on an average of 30's yarn. The production on the frames was increased 17½ per cent., with the same breaking strength, slightly in favour of the variable-speed spinning.

The variable-speed spinning is an old scheme in Europe, where there are some five million spindles being operated by variable speed. They, however, use a different system in Europe from what we do in this country, using more or less what we call the "replacement-type" motor.

In this part of the country three manufacturers have attempted to manufacture it—the Westinghouse, General Electric, and one other company. Up to date a satisfactory motor has not been produced, for the reason that a satisfactory motor would contemplate the use of brushes on a commutator, and that is not at all acceptable to the industry at this time.

The variable-speed motor is one that will make a complete change in production as far as the spinning room is concerned, but it is, as friend Stone says, somewhat in the future. Many of them have been tried, various types have been used, but it has not yet reached the point where the manufacturers care to stand behind the motor as an operating factor that will be perfectly satisfactory. But make up your mind that variable-speed spinning is coming, because it is logical; it is in the right direction for a consistent tension on the yarn from the empty bobbin to the full bobbin; it makes no difference whether it is a warp wind or filling wind; and the electrical men are devoting considerable attention to it because we recognize in this matter of variable-speed spinning one of the great aids to the textile industry.

A HALF-MILLION FOR REVAMPING.

Mr. **COTTINGHAM**: There was a gentleman in my office last week, a very close friend of mine. He was telling me that he had to do some revamping in his plant, and he went before his president and the directors and made the statement that if they would give him around a half-million dollars, and let him revamp the plant, he would guarantee to save them 2 cents a pound within three years. They came back to him, and asked, if he could do that in three years why not revamp the plant in one year?—and he promised he would.

It is a plant of around 70,000 or 80,000 spindles, running day and night, so they allotted him this amount to revamp it, and he completed the job within the year, as he had promised. He told me that since this revamping he had already reduced his cost 3 cents a pound, so you see what new machinery and rearranging a plant will do.

Of course, we have plants where I think we could do the same thing, but where the half-million dollars is coming from I don't know.

One of my Greenville friends is fixing to revamp his plant, and I believe he told me he was going to spend $350,000, and he has already figured out where he could save $20,000 a year by this rearranging and revamping. What the mills of the country have to do is to keep up to date, and keep the plants up to date, but fellows in our positions have to look to someone else for the money to do all this work with. We can tell our presidents and treasurers how it should be done, but getting it done is sometimes a different proposition, though we can readily see it certainly does pay to keep our plants on top.

ONE-PROCESS PICKING.

Mr. **DILLING**: Mr. President, in regard to the one-process picking system. Our friend Mr. Graves, over there, sold me the idea. I was rather sceptical about it, but we have it in operation, and it is giving us a saving of 15 per cent. on the investment, or rather earning that on the investment, in the saving we get, in addition to less pick hours, less floor space, and better work.

Costings in Lancashire Mills—Saving Through Introduction of Double Shift.

Captain Ryan, one of the directors of the Lancashire Cotton Corporation, gave in December before the Manchester branch of the Institute of Costs and Works Accountants a paper, from which we extract the following:—

SPINNING COSTS.

An average trading account might show:—

	£	Percentage	Percentage without cotton
Cotton	125,000	71·4	—
Wages	25,000	14·3	50
Interest and depreciation	8,000	4·6	16
Salaries and fees	4,500	2·6	9
Coal	3,500	2·0	7
Consumable stores	3,000	1·7	6
Carriage and forwarding	1,500	·8	3
Repairs	1,500	·8	3
Rates and taxes	1,000	·6	2
Insurances	750	·4	1⅓
Gas, water and electricity	750	·4	1⅓
Sundries	750	·4	1⅓
	175,250	100·0	100·0

The raw material cost is nearly three-quarters of the yarn cost; wages and expenses were almost equal to half the remainder. The interest and depreciation item is obviously an arbitrary one; coal is the largest single item of consumable stores cost, and rates and taxes do not appear as the enormous burden which is sometimes popularly supposed.

MOISTURE CONTENT.

One of the most serious problems from a costing point of view in spinning and weaving is the moisture content determination.

Raw cotton comes to the mill with a supposed moisture content of 7.8 per cent. Actually it varies very considerably from this figure, and, as there is no redress from this excess moisture unless the excess is enormous, very little effort is taken to determine the exact content.

In going through the various processes this moisture is gradually lost. Two to three per cent. is lost in the very early stages of opening and cleaning the cotton. As cotton spins better in a humid atmosphere, which is, of course, one of the natural advantages which attracted cotton manufacture to Lancashire, it is important to render this moisture loss as little as possible. Humidifiers spraying water through fine nozzles in the various rooms are used in modern practice to achieve this end.

The deficiency, whatever it is, is replaced by laying the finished yarn between damp cloths or on the floor of a damp warehouse. Obviously it is not a very scientific way of adding a definite percentage of water, and the investigation of the weight of the finished yarn per unit of raw material and the weight of raw material required to produce a pound of this finished yarn is by no means an easy matter.

An error of 1 per cent. means from ⅛d. to ¼d. per pound, and this figure in a normal spinning mill may mean 2 per cent. to 3 per cent. on the capital employed. The crude methods employed in many mills to try to make allowances for the moisture content are so fallacious that they would probably not be believed, even if explained.

DOUBLE-SHIFT WORKING.

When considering spinning costs in the light of double shifts, the problem is to know what saving such increased working would be. Wages and cotton absorb 85.7 per cent. of the yarn cost, leaving 14.3 per cent. alone which can be affected.

If all the expense items remained the same for two shifts, and no additional expense was involved, the saving in cost would be about 7 per cent. That, therefore, is the maximum under present working conditions.

If one of the shifts was a night one, this maximum would be lower, since the wage bill would be higher for the night shift.

But is this a real maximum? Many of the expense items are immediately doubled. Consumable stores will vary almost directly with the hours worked, repairs increase, rather more staff is required. Interest is higher on the increased capital required for the larger turnover, depreciation must be increased, and we are left with very few fixed items.

Taking them item by item, it becomes evident that 3 per cent. to 4 per cent. saving is the maximum rather than 7 per cent.

It is important to notice that certain of our competitors have an advantage by double shifts which is not available for us.

Let us assume that an Eastern competitor has the same total cost, because, in spite of cheap labour, expense items are higher. Instead of our £25,000 wages and £25,000 expenses we assume £15,000 wages and £35,000 expenses for their production.

If we can save £7,500, or 4 per cent., by double shift, they can save 10½ per cent. by double shift, since the item affected is larger.

Generally speaking, this is true of all our competitors. An investigation conducted in America, where double shifts are extensively employed, gives the following results:—

COMPARISON OF COSTS WITH SINGLE AND DOUBLE SHIFTS IN A TYPICAL SOUTHERN UNITED STATES PRINT CLOTH MILL, WITH A VILLAGE.

	Day operation %	Day and night operation %
Cotton with waste	60	60
Pay-roll	21·8	22·5
Fixed expenses, taxes, fire insurance, exec., salaries, building repairs and depreciation, miscellaneous expenses, and machinery obsolescence	6·5	3·4
Expense, which increases with extra operation: fuel power, supplies, machinery, depreciation	11·7	12·0
	100·0	97·9

These tabulations indicate that well-run mills now operating 55 hours per week—and maintaining own village—can reduce total costs about 2 per cent. by operating two shifts.

On some of the leading print cloth constructions this represents about $\frac{5}{32}$ of 1 cent a yard.

An Indian investigation shows an

INDIAN MILL

Cost items	Cost for single shift Rs.	Cost for other shift Rs.
Power and gas	1,315	1,300
Stores	1,883	1,880
Labour	5,065	5,065
Office and supervision	453	
Fire insurance	215	
Municipal and other taxes	205	
Interest	733	367
Commission on cloth	600	600
Dyeing charges	573	573
Agents' commission	108	108
Income tax and super-tax	252	252
Cotton cess and town duty	60	60
Total	11,462	10,208

This table is for the working of 25,000 lbs. of yarn per day. According to this a saving of 10.9 per cent. may be effected by double-shift working, equalling 5.8 per cent. on whole.

The problem is one which will need very serious consideration in weaving mills, owing to the advance of the automatic loom. Here one is replacing labour by expensive machinery, and the present balance of wages to expenses is entirely altered. Investigations are proceeding in order to arrive at the true statistical nature of the problem, but the policy is one which brings up all sorts of difficulties.

WAGE LISTS.

The variation in prices quoted for similar articles made in different parts of Lancashire is due in some degree to the extreme complication of wage lists, which renders it sometimes uneconomic to produce the article for which the machinery is best fitted.

Wage lists, the results of patchwork additions and subtractions

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for three-quarters of a century, are an anachronism. In spinning, Oldham, Ashton, Bolton, etc., all have different methods of arriving at standard lists, and when applied to each mill these so-called standards are standard only in name.

Actually the working out of the piece rates from the lists is not mathematically accurate, but contains assumptions which render it approximate only. How much useless labour is employed each week in Lancashire as a result of this state of things?

The time has come to make a new set of conditions, to simplify the whole of the labour conditions, and lift the whole question out of its parochial atmosphere.

The Lancashire Cotton Corporation.

Owing to the interest with which the cotton industry is watching the formation of the Lancashire Cotton Corporation, we publish herewith a statement issued by this comporation's directors last December:—

What then has been the progress of the Lancashire Cotton Corporation in the first nine months of its existence?

It has examined some 190 to 200 concerns, embracing more than half of the American spindles.

To 135 of these companies offers of absorption have been made. Twenty-five companies have been refused as being units impossible to be turned into efficient plants, and the two million spindles concerned are being, or have already been, sold for scrap. It is not in the interests of Lancashire that these units should operate.

The remaining companies are still in abeyance in some form or another. Meanwhile fresh properties are brought to notice for investigation each week.

Of the 135 companies, for which firm offers were made, 20 did not proceed further, nor in many of the cases did they expect to. The Lancashire Cotton Corporation realized that some of these tentative approaches were made merely for curiosity or to satisfy the pressure of some interested party, but kept faith with its offer to the trade. These offers have since been withdrawn, and future negotiations, if any, will not necessarily be upon the same basis.

Seventy-one companies controlling 6¼ million equivalent spindles and 20,000 looms have definitely agreed to join the Corporation, and the necessary scheme of arrangement and agreements are being prepared. It will not be necessary in many cases to go to Court for sanction, so that all the mills absorbed will not appear publicly in this form.

Of these the following mills have already been approved for absorption:—

Ace Mill
New York Mill
Monton Mill
Castle Spinning Co.
River Meadow Mill
Royd Mill
Bolton Union Spg. Co.
Welkin Ring Mill
G. H. Kenworthy & Son
Lutwidge Mill
Saxon Mill Co. Ltd.
Napier Mill
Darcy Mill
Marne Ring Mill
Lees Union Mill
Grange Mill
Roe Greave Commercial Co.
H. Bannerman's Mills at Ancoats and Dukinfield
Higher Walton Mills

Forty-five companies are negotiating upon the offers made to them, and it is expected that in the next month or two some half of these will agree to go forward.

The Corporation can thus visualize the absorption of 10 million spindles in a comparatively short time.

Meanwhile the organization has been almost completed.

The Directorate has been gradually strengthened during the year from the original Directors: Sir Kenneth D. Stewart, K.B.E., J. L. Tattersall, Esq., John Ryan, Esq., Sir James A. Cooper, K.B.E., W. James Orr, Esq., by the addition of Colonel A. C. Todd (the Liverpool agent of Messrs. Baring Bros. Ltd., the Merchant Bankers); Mr. J. C. Finlay (the late President of the Liverpool Cotton Association); Mr. Frank Hodges (whose contact with the important problems of coal and electricity is combined with his close touch with labour problems).

For the purchase of raw cotton an office under the control of Mr. E. N. Frimston has been opened in the Cotton Exchange Buildings, Liverpool, and a Manchester office at Blackfriars House, under Mr. J. B. Kershaw, who organized and had control of the Manchester Spot Cotton Central Selling Rooms. Bulk purchases of cotton have already been made, and usual trading is being carried on.

It is the intention of the Corporation that all buying and selling shall be done centrally, and Mr. F. Lee, late of Messrs. Leech & Sinkinson, yarn merchants and shippers, of Leeds, has been engaged as yarn sales manager, and Mr. H. Mothersill as cloth sales manager, the trading of the private firm engaged in this work being absorbed, and these departments are actively trading.

Superintendents in power, spinning and weaving are already at work reorganizing the plants.

In this connection it can be noted that the Monton Mill has been stopped and stripped, and is to be overhauled from top to bottom. Amongst other work, some 120 cards are being completely re-clothed, and the mill will restart in the spring in efficient condition to spin the counts for which its machinery has been adapted.

Similar extensive work is contemplated at the New York Mill.

Departmental staffs exist in skeleton form, and are being increased as the Corporation grows. This staff is being mainly recruited from the staffs of the mills concerned, and already three former mill secretaries and several assistant secretaries have been transferred from the mills to Head Office.

Early in the New Year the capital of the Corporation will be increased to about £2,000,000, and at the same time an issue of Income Debentures of about £1,500,000 will be made to satisfy the purchase consideration.

These amounts will be increased in several stages during the year.

Investigations of the trading positions show that the economies which were expected to arise from the Corporation's activities were very moderate, and, in several directions already, arrangements have been made which will give much greater savings than were estimated.

It will be the aim of the Corporation to consolidate every advantage during 1930, so as to investigate and reorganize the plants and equipment being absorbed so that each mill may play a full part in bringing the trading to a successful level. Considerable interchange of machinery, and to some extent replacement of portions of plants, will be necessary, and will proceed at a steady pace, gradually raising the level of efficiency and production.

In this work help will be confidently expected from the operatives, who will have every opportunity of helping in producing better conditions.

A NEW COTTON INDUSTRY.

A new cotton-spinning and weaving mill has recently been completed at Ashkhbad, Turkmenistan (Central Asia). During the first year it will turn out only 3,000,000 metres of cloth. About 600 workers are now employed. It is stated that the mill contains 10,000 spindles and 350 Northrop looms, all manufactured at Soviet works. In five years time it is hoped to have 40,000 spindles and 1,440 looms working, employing 2,500 operatives, and with a yearly production of 35,000,000 metres.

The Hua Sing Cotton Mill of Tientsin.

In view of the description of Chinese mills in the recently published report of the International Cotton Federation, the following description of a Chinese mill, situated in the North, may be of interest. As pointed out in the Report of the International Cotton Federation, a number of mills up-country find board and lodgings for the operatives in a similar way as Japanese mills do in Japan, whilst those in the Shanghai district do not.

The Hua Sing cotton mill, with an authorized capital of $2,000,000, is located in the centre of Siao Yu Chuang, Hopei District, Tientsin. The mill occupies a site of over 200 mow and owns 14 buildings, including nine godowns, one dormitory each for male and female apprentices, one dining hall, one public bathroom, one dispensary and one high school for the workers' children.

The internal organization of the mill may be separated into two divisions, the executive and the engineering. The executive division looks after general business, including correspondence work, accounting, auditing, etc., while the engineering division consists of six departments—the electric, cotton preparation, slubbing, spinning, yarn twisting and packing department.

The power plant supplies electricity for the whole mill. It is equipped with a huge dynamo of 800 h.p., and it consumes 24 tons of coal in every 24 hours.

The spinning department constitutes one of the most important sections of the mill whose profit and loss are largely dependent upon the quality of the products turned out by this department. It is equipped with 94 spinning machines of two different makes. The cotton-twisting department is equipped with 210 machines, and they are power-driven and the job is attended to by women workers. The packing department is equipped with one big packing machine and 10 small ones. The cotton yarn turned out by the above departments is first packed in small parcels, and 40 of these small parcels are bundled into a large bale.

The total number of hands employed by the mill is 1,800, 20 being the percentage for females. The working hours consist of eight hours a shift, and the average wage amounts to $0.40, inclusive of board and lodging. The boarding houses for the workers are built by the management, and they are rented out to them at the rate of $1 a room per month. The board and lodging expenses for the apprentices are borne by the management. Their diet is composed of rice, noodles and various kinds of vegetable. No meat is served. But as for the workers, since they provide their own meals, they are privileged to cook meat in the kitchen of the mill. The workers' children are asked to attend free school, which is run by a principal, four man teachers and four woman teachers. The total number of students enrolled is 140. The entire amount of expenses incurred for purchase of stationery is also borne by the management.

The mill owns 27,000 spindles. Its products are of three varieties, namely, the 10-counts, the 16-counts and the 32-counts yarn. They are marketed under three different trade marks, each carrying a different weight. The standard weight of a bale of yarn for the " Three Star " brand is 420 lbs.; that for the " Shun Siao " brand 410 lbs; while that for the " Shih Chuan " brand is 430 lbs. The daily output of the mill totals 70 packages. (*Chinese Economic Review*, July, 1929.)

SAFETY IN INDUSTRY.

The Bulletin of the National Association of Cotton Manufacturers for December publishes an article dealing with the risk of accident to cotton mill employees based on a tabulation recently issued by the United States Bureau of Labour.

In the average textile mill each employee is exposed to accidents at the folowing rate:—

One temporary injury every 83,000 hours of exposure.

One permanent injury every 2,900,000 hours of exposure.

One death every 50,000,000 hours of exposure.

Or based on a working year of 300 days of eight hours each, the probability of temporary lost time accident for each employee is 34 to 1; of a permanent disability 1,000 to 1; of an accident resulting in death 20,000 to 1.

Textiles continue to be the safest industry, according to Bulletin 490 of the Bureau of Labour Statistics dated August 1929, just released for distribution. The findings in this bulletin are summarized in the following table.

ACCIDENTS IN INDUSTRY

Frequency rate per 1,000,000 hours of exposure. Severity rate per 1,000 hours of exposure.

	Death		Permanent Disability		Temporary Disability		Total	
	Frequency	Severity	Fre.	Sev.	Fre.	Sev.	Fre.	Sev.
Construction	.65	4.82	1.62	1.32	62.79	.99	65.06	7.13
Quarry	.58	3.48	.97	.94	52.18	.79	53.73	5.21
Public Utilities	.43	2.61	.22	.31	29.97	.41	30.62	3.33
Petroleum	.23	1.40	.98	.54	27.95	.47	29.16	2.41
Woodworking and Lumber Manufacturing	.15	.92	1.29	.73	46.24	.58	47.68	2.23
Chemical	.20	1.21	.61	.50	16.53	.29	17.34	2.01
Metals	.13	.77	1.06	.69	24.75	.42	25.94	1.88
Paper and Pulp	.15	.87	.34	.84	26.94	.36	27.43	1.57
Food	.11	.66	.61	.35	18.95	.33	19.67	1.34
Automotive	.04	.24	.96	.46	20.46	.33	21.46	1.03
Packers and Tanners	.03	.18	.86	.32	44.53	.50	45.42	1.00
Power Press	.03	.21	.97	.49	18.22	.24	19.23	.94
Rubber	.05	.29	.33	.25	29.49	.39	29.87	.93
Textiles	.02	.13	.34	.26	12.12	.15	12.48	.54

Japan's Cotton Industry.

In a pamphlet of 100 pages, entitled "Economic and Financial Conditions in Japan," June 30, 1929, published by the Department of Overseas Trade, London, interesting material has been contributed by H.B.M. Consul M. Paske-Smith, of Osaka. It will be seen from the following pages, in which we reproduce that section which we consider of interest to our members, that the writer is in close contact with the Japanese cotton industry; the figures of export, output, etc., given in the Consul's

Report are a continuation of the tables contained in our recent publication, " The Cotton Industry in Japan and China."

Mr. Paske-Smith writes as follows:—

The following statistics, which, though not entirely satisfactory, are the best available, show for the last three years the numbers of companies in Japan engaged both in spinning and weaving, the number of their factories, their spindleage and their looms:—

	1926	1927	1928
No. of companies	64	70	71
No. of factories	247	257	259
Spindles: Ring	5,679,000	6,128,024	6,425,000
Mule	35,080	41,674	41,674
Looms	77,043	79,274	81,209

Out of 259 factories 245 belonged to members of the Japan Cotton Spinners' Association, and of the total spindles 6,249,648 ring and 36,994 mule were owned by members; and of the looms 76,727. Owing to restrictions in output the actual number of working spindles of members at the end of December, 1928, was only 5,113,921; the date for the compulsory abolition of night work in Japanese cotton factories is July 1, 1929, but many companies have already anticipated this date, and it is estimated that 4,289,194 spindles or 67·3 per cent. of the total spindleage of members stopped night work on June 1, 1929. The increase in spindles has been made to meet the difficulties expected to arise in the cotton industry if the yarn output decreases when working hours for all mills are reduced to 17 from 20. At present, member mills which have already stopped night work are allowed (*a*) to work all of their spindles with four days a month rest, or (*b*) to stop 4 per cent. to 8 per cent. of their spindles with two or three days' rest.

Generally speaking, almost all the mills which have stopped night work are working 96 per cent.—92 per cent. of their spindles with three or two days' stoppage per month.

It is difficult to give an accurate forecast of the increase in members' working spindles this year, but the following figures are said to be approximately correct:—

Number of working spindles December, 1928 .. .. .. 5,113,921.
„ „ „ March, 1929 5,266,242,

an increase of 152,321, which is equivalent to 610,000 for a whole year, or 62 per cent. more than last year's increase. However, owing to the complete abolition of night shifts after the 1st July, it is expected that the actual increase for the latter nine months of the year will be only 100,000; thus the total increase for the year should be about 252,000 working spindles.

The output of yarn has already shown a tendency to rise, the output for May being 231,864 bales, compared with 229,601 in April, 218,635 in March, 261,551 in February and 219,399 in January; it is believed that from March onward the output will be some 235,000 bales per month.

As regards the weaving industry it is not so easy to forecast results of the abolition of night work because it includes a lot of local weavers, whose working conditions are varied and elastic according to current demands. The bulk of the cloth made by member companies of the Japan Cotton Spinners' Association is exported. The member companies used last year for weaving in their own sheds 757,000 odd bales of yarn, while 70,309 were exported, thus leaving 1,624,036 bales, which were consumed by the independent weaving sheds and hand looms. A comparison of the consumption of yarn in the first three months of 1929 with those of 1928 may also be of interest:—

Year	Number of running spindles	Turn-over bales	Yarn used for making their own cloth	%	Amount of yarn exported	%	Balance to sell for domestic use	%
1929 ..	5,197,475	654,586	202,146	30·1	16,572	2·5	435,858	67·4
1928 ..	4,684,448	586,491	176,610	30·9	18,583	3·1	391,298	66·0
Dec. or inc.	+ 513,027	+ 68,095	+ 25,536	—	—2,011	—	+ 44,560	—

Japan itself is, therefore, still easily the greatest purchaser of its own yarn, and provides the best market for the spinners. Consequently the elastic nature of the weaving industry itself will possibly enable the cotton industry to tide over the change with no material difference.

The following figures of output of yarns are interesting as showing the rising tendency in Japan to produce finer counts :—

OUTPUT OF YARN BY COUNTS.

	1926	1927	1928
		(400 lb. bales)	
Yarns under 20's ..	1,629,698	1,570,910	1,414,339·5
Yarns 20's to 40's ..	637,499·5	643,325·5	728,389·5
Yarns over 40's ..	16,164	20,618	29,653
Doubled yarns ..	248,847	224,903·5	210,740
Gassed yarns.. ..	75,537·5	70,935·5	68,740
	2,607,746	2,530,692·5	2,451,862

In 1928 Japan used about 4,800,000 kwan of raw cotton less, due to the restrictions on output. Her requirements over the past three years have been as follows :—

Year	Indian	American	Chinese	Egyptian	African	Totals including others
			(in 1,000 kwan)			
1926	79,758	58,355	2,394	3,650	1,575	148,430
1927	66,188	67,451	1,900	3,736	993	142,694
1928	61,794	61,893	7,369	3,399	1,063	137,914

Owing to her increasing output of finer counts Japan has come to use more American cotton since 1926; the large increase in Chinese cotton last year is due to the feverish import of Chinese cotton on account of the extraordinary fine harvest in China. The import of Japan's cotton supplies is undertaken by a number of import firms, foreign and Japanese, established in Osaka; 70 per cent. of the trade is done by three large Japanese firms, which are also interested in the export of cotton and other textiles. Business is speculative and success has depended largely on importers taking a correct view of the market; consequently the cotton importers, owing to the keen competition, find it hard to make both ends meet. For the previous half-year trading results have, it is said, been none too good, and the lesson learnt may lead to less speculation. Advantageous as these speculative methods may be to the mills, which can thereby often purchase their cotton under replacement costs, it may be doubted whether the system can be considered healthy in the long run for the Japanese cotton industry.

Exports of both yarns and cloth in 1928 have been disappointing to the trade, as they showed a further decline on the figures for 1926 and 1927 as below :—

	1926	1927	1928
		(1,000 yen)	
EXPORTS OF YARN.	70,716	38,794	25,894
EXPORTS OF COTTON CLOTH.	413,699	381,760	352,217

The exports of yarn have decreased year by year owing to the development of Chinese cotton mills since the Great War, which have been supplying Japan's former markets for coarse counts both in China and India. This loss in yarn exports has, however, been largely compensated by increased consumption at home, due to the development in weaving machinery owned both by members of the Japan Cotton Spinners' Association and by factories engaged mostly in domestic trade.

It is a curious fact that in China itself the anti-Japanese boycott has not prevented a rise in the value of cotton cloths shipped there during 1928, whereas in other Eastern markets, such as the Dutch East Indies, Philippine Islands and India, exports have declined. The explanation seems to be that during the first half-year large quantities of goods contracted for by Chinese importers threatened to be left on exporters' hands in Japan, and, owing to financial stringency, had to be cleared through other sources at a sacrifice resulting in abnormal exports. In the second half-year, however, trade was unexpectedly bad in China, due to the pressure of the boycott and active competition from the United Kingdom and the United States. The following figures demonstrate these points :—

IMPORTS OF COTTON CLOTHS AT SHANGHAI FROM JAPAN, UNITED KINGDOM AND UNITED STATES OF AMERICA, 1927 AND 1928.

	January to June		July to November	
	1927	1928	1927	1928
Shirtings				
U.K.	65,600 tan	94,168 tan	70,853 tan	208,693 tan
U.S.A.	40 „	4,800 „	5,000 „	6,000 „
Japan	152,465 „	292,010 „	172,730 „	42,420 „
Jeans				
U.K.	7,457 „	1,000 „	—	21,200 „
Japan	92,860 „	69,518 „	82,673 „	19,400 „

As regards the kinds of cloth exported from Japan, it is important to note that finished cloths have attained a large percentage; but for the boycott in China last year it is probable that the percentage in 1928 would have again risen over the previous year.

EXPORTS OF THREE KINDS OF CLOTH—1926—1928.

	1926		1927		1928	
			(1,000 yen)			
Grey cloth	117,977	28·5%	105,661	28%	95,341	27%*
Bleached cloth ..	28,247	7%	13,615	6%	27,244	7·5%
Finished cloths ..	267,475	64·5%	252,484	66%	229,632	65·5%
	413,699	100%	381,760	100%	352,217	100%

* NOTE.—The published figures give 123,329,000 yen for grey cloths, but this year the J.C.S.A. changed its method of classification. Until 1927 the grey goods contained only grey shirtings and sheetings, whereas from 1928 such grey cloths as nankeens, drills, jeans, have been added to the grey cloths and deducted from the finished cloths. In this Table the old system has been followed for purposes of comparison.

While the anti-Japanese agitation in China is now reported to be subsiding and this year's exports for the first four months show some improvement it is obvious that the Japanese cotton industry is facing difficult times. It is estimated that the abolition of night work will add 5 per cent. to the costs of mill owners, and, as no reduction in wages seems possible, the cotton leaders are seeking other methods to economize. One or two of the weaker companies have already been amalgamated with stronger companies and discussions are already proceeding regarding the possibility of joint purchase of factory supplies, joint contracts for electric power and insurance facilities. So far, however, nothing has definitely materialized along these lines. Practically all the new looms installed, which number over 4,000 since 1926, have been of the automatic type, and it is now estimated that there are 20,000 to 25,000 such looms in Japan, which means a considerable saving in labour; in fact, since 1926 the number of hands employed by members of the Association has fallen from 239,915 to 199,004, as shown in the following table :

		1926	1927	1928
Spinning :	Male	40,735	38,762	37,842
	Female	141,787	131,384	117,282
		182,522	170,146	155,124
Weaving :	Male	9,216	8,648	8,565
	Female	48,177	41,879	35,315
		57,393	50,527	43,880
Total :	Male	49,951	47,404	46,407
	Female	189,964	173,273	152,597
		239,915	220,677	199,004

In January, Sir John Tilley, H.B.M. Ambassador, while on a visit to the Kwansai district was entertained to dinner by the Japan Cotton Spinners' Association, supported by prominent bankers, shipowners and merchants. The Japanese cotton leaders used the occasion to mention trading difficulties actually encountered or likely to occur in British Dominions and expressed their hopes of continued co-operation in trading matters between Great Britain and Japan. In his reply the Ambassador emphasized the opportunities before both nations of harmonious commercial policies.

COTTON HOSIERY.

The volume of Japan's exports of cotton underwear showed an increase of roughly 10 per cent. during 1928 as compared with 1927. The following detailed figures of exports are worth reproduction as a typical example of the development of Japan's foreign trade :—

Countries	1926		1927	1928
British India	2,836,818	dozen	2,914,465	3,605,345
	9,349,813	yen	8,078,255	9,463,841
Philippine Islands ..	1,355,482	dozen	1,666,339	1,547,647
	4,097,701	yen	4,583,548	4,136,902
Dutch East Indies ..	864,038	dozen	988,285	707,153
	2,849,044	yen	2,964,226	2,077,657
United Kingdom	488,934	dozen	1,011,881	1,837,280
	2,340,299	yen	3,507,498	4,515,653
Africa (including Egypt)	861,693	dozen	1,558,300	1,914,455
	2,816,993	yen	4,423,402	5,345,829
South America	375,472	dozen	659,862	649,997
	1,466,285	yen	1,507,790	1,456,480
China	376,603	dozen	417,923	387,688
	1,624,252	yen	1,754,140	2,524,794
Kwantung	264,084	dozen	188,401	230,986
	1,119,119	yen	874,156	1,146,086
Straits Settlements ..	212,521	dozen	213,919	84,540
	397,273	yen	519,138	217,318
Hong Kong	214,222	dozen	130,277	181,208
	1,124,613	yen	581,156	726,852
New Zealand	162,418	dozen	142,144	39,134
	321,482	yen	280,685	134,834
Canada	39,697	dozen	40,307	34,464
	224,705	yen	174,016	104,079
United States of America	10,965	dozen	12,576	8,045
	36,023	yen	36,525	20,013
Asiatic Russia	309	dozen	1,493	5,473
	898	yen	4,076	11,087
Others	311,771	dozen	328,282	105,137
	490,740	yen	455,271	239,298
Total	8,575,029	dozen	10,214,458	11,538,549
	28,459,240	yen	29,744,413	32,120,723

Divided into kinds of goods, the figures were :—

Countries	1926		1927	1928
Undershirts	6,701,003	dozen	7,997,465	8,298,522
	25,260,811	yen	26,064,979	26,814,704
Gloves	281,391	dozen	300,103	266,469
	462,600	yen	378,741	473,643
Socks	1,566,980	dozen	1,894,462	2,949,900
	2,436,018	yen	2,819,154	4,475,097
Others	24,652	dozen	22,427	23,656
	299,811	yen	281,539	357,279
Total	8,575,029	dozen	10,214,458	11,538,549
	28,459,240	yen	29,744,413	32,120,723

Trade during the first four months of 1929 has also been well maintained, although from a profit-making point of view the position of the weaving mills, which operate on a large scale, is said not to be very sound because, to meet competition on the overseas markets, they are compelled to accept orders at whatever prices are offered regardless of profits. The result is that the export side of their business is not paying; on the other hand, domestic trade is reported to be more lucrative, though hardly sufficient to cover the losses on exports. Japanese goods are finding favour in the Balkan States, and it is hoped that these new markets may provide increased outlets this year. In markets such as the Straits Settlements, Dutch East Indies, Philippines, where Chinese distributors are powerful, sales have fallen off owing to the anti-Japanese agitation.

ARTIFICIAL SILK TISSUES.

Statistics which have been prepared by a reliable source of information show some striking developments in the export of tissues of artificial silk. The value of these exports has risen from 1·7 million yen in 1927 to 8·3 million yen in 1928 and 9·6 million yen in the first five months of 1929. The markets which absorb them are Far Eastern ones, viz. : China and Manchuria, Hong Kong, the Philippine Islands, Dutch East Indies, Strait Settlements and India. A detailed statement follows :—

	1927	1928 (1st half)		1928 (2nd half)		1929 Jan.–May.	
	1,000 yen	1,000 sq. yds.	1,000 yen	1,000 sq. yds.	1,000 yen	1,000 sq. yds.	1,000 yen
Philippine Islands	150	681	358	1,748	680	2,357	1,473
British India ..	186*	551	474	1,294	845	3,411	2,095
Hong Kong ..	192	514	348	2,044	1,135	2,758	1,657
China	215	549	436	1,667	1,140	1,483	995
Kwantung Province	308	290	267	1,672	1,367	1,513	1,161
Straits Settlements	93	699	459	419	281	1,508	919
Dutch East Indies	186*	299	188	448	242	1,530	973
Other	380	48	37	107	71	612	351
Total	1,710	3,631	2,567	9,399	5,761	15,172	9,624

* There is some confusion between British India and the Dutch East Indies in the 1927 figures; half the total exports to these two destinations have accordingly been assigned to each.

The demand is said to be for light textures and bright colours. As in the case of woollen goods, Japanese manufacturers are believed to aim at extending their trade abroad rather than at meeting the entire home demand, partly because payment for export goods is made more promptly, partly because it is desired to establish a footing in foreign markets. On the other hand, imports into Japan are burdened with a duty of 100 per cent., *ad valorem,* so that the prospects of British manufacturers developing a trade with Japan are not good.

ARTIFICIAL SILK YARN.

This industry has made phenomenal progress during recent years. Generally speaking, it has now reached a position where the requirements of the country can be supplied except for a comparatively small demand for yarns of finer deniers than are at present produced in Japan. Actually imports of artificial silk yarn for the first four months of 1929 show an increase as compared with those for the same period of the previous year, viz., 172,711 lbs. in 1929, as against 70,909 lbs. in 1928. The export trade in artificial silk yarns has not attained proportions of any importance, in fact returns for the present year show a considerable decline. When the rapid growth in the export of artificial silk tissues—referred to in another section of this report—is taken into consideration, it appears evident that the demand in Japan for yarn is at present too active to allow of any significant margin for export.

There are at present—(June, 1929)—eleven works manufacturing artificial silk, with an investment of capital which has risen from Yen 2,805,000 in 1923 to an estimated total of Yen 90,000,000 in 1929. The output of these works has increased from 150,000 lbs. in 1921 to 14,355,000 lbs. in 1928. The expansion of the industry has been especially rapid during the last three years. During the present year a further increase is anticipated. While in its earlier stages the demand in Japan grew more rapidly than domestic production, conditions have now changed as indicated above.

The following table shows figures of production, imports and exports since 1921, but it should be noted that the export figures prior to 1927 are based upon estimates :—

	Production	*Imports* (lbs. avoir.)	*Exports*
1921	150,000	138,052	5,000
1922	250,000	224,652	6,000
1923	800,000	1,008,897	5,000
1924	2,000,000	897,691	10,000
1925	2,800,000	826,159	15,000
1926	5,000,000	3,295,622	10,000
1927	11,000,000	793,299	37,430
1928	14,355,000	254,724	67,613

The decline in prices of artificial silk in Europe and America during 1928 reacted upon prices in Japan, other contributing causes being the depression in the textile industry and competition among Japanese manufacturers. Quotations have in fact shown a general downward tendency since the beginning of 1926. Such a decline in prices was natural when one allows for the reduction in manufacturing costs and the loss of the monopoly of manufacture enjoyed by the pioneer companies. Owing to the prevailing economic depression and the heavy increase in production the tendency has become more pronounced. The lowest point was reached in June, 1928, when Teikoku Artificial Silk Company's 150-denier " B " was quoted at Yen 214·00 per 100 lbs. and the Asahi Silk Weaving Company's goods of the same grade were at Yen 202·84. Following a price agreement concluded in the next month between leading manufacturers, prices recovered, though they are still considered below the level in 1927 and the early part of 1928. Some quotations are given below :—

(Denier 150, B, per 100 lbs.)

	Teikoku Artificial Silk Co. yen	Asahi Silk Weaving Co. yen
1927—Highest (April)	287·80	296·00
Lowest (November)	222·87	226·00
1928—Highest (February)	276·54	281·04
Lowest (June)	214·00	202·84
1929—January–March	223·00	223·00
April	216·63	213·79

The financial results of artificial silk companies have generally been satisfactory. The average profit rate of the five leading companies was 5·4 per cent. for the first half of 1927 and 14·1 per cent. for the last half of 1928. The business results of the five leading companies since 1927 were as follows :—

	Paid up capital (1,000 yen)	Net profit (1,000 yen)	Rate of profit %
1927—First half	33,248	894	5·4
Last half	45,500	1,767	2·7
1928—First half	45,500	2,384	10·5
Last half	45,500	3,218	14·1

(Received too late for classification).

GRADE AND STAPLE REPORT, U.S.A.

On page 286 in the American Section we referred to the Grade and Staple Report for 30th November last. We are now able to give a summary of this report :—

SUMMARY

	1929		1928	
	Bales	Per Cent.	Bales	Per Cent.
Total crop (as reported by the Bureau of the Census	12,859,000	100.0	12,560,000	100.0
Total American Upland	12,841,000	99.9	12.538,800	99.8
Total American-Egyptian	18,000	0.1	21,400	0.2
Grades (American Upland) :				
White, middling and better ...	8,939,000	69.6	9,538,000	76.1
White, strict low and low middling	2,104,100	16.4	1,372,200	10.9
White, below low middling ...	112,500	0.9	105,900	0.8
Spotted and yellow tinged ...	1,300,500	10.1	1,177,200	9.4
Light yellow stained, yellow stained, gray, blue stained ...	7,700	[1]	11,900	[1]
Tenderability on Section 5 futures contracts (American Upland) :				
Total tenderable	10,040,000	78.2	10,708,500	85.4
Tenderable $\frac{7}{8}$ in. to $1\frac{1}{32}$ ins. inc.	8,644,200	67.3	9.478,500	75.6
Tenderable over $1\frac{1}{32}$ ins.	1,395.800	10.9	1,230,000	9.8
Total untenderable	2,801,000	21.8	1,830,000	14.6
Untenderable in grade	182,600	1.4	156,100	1.2
Untenderable in staple	2,503,200	19.5	1,630,400	13.0
Untenderable in both grade and staple	115,200	0.9	43,800	0.4

Staple (American Upland) :	1929 Bales		1929 Per Cent.
Under $\frac{7}{8}$ in....	2,618,400	...	20.4
$\frac{7}{8}$ in. and $\frac{29}{32}$ in.	4,873,000	...	37.9
$\frac{15}{16}$ in. and $\frac{31}{32}$ in.	2,429,700	...	18.9
1 in. and $1\frac{1}{32}$ ins.	1,516,000	...	11.8
$1\frac{1}{16}$ ins. and $1\frac{3}{32}$ ins.	778,000	...	6.1
$1\frac{1}{8}$ ins. and longer	625,900	...	4.9

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[1] Less than one-tenth of 1 per cent.

MISCELLANEOUS

ENQUIRY INTO THE TEXTILE INDUSTRY.

SECOND MEETING OF THE ADVISORY COMMITTEE.

The Committee on Conditions of Work in the Textile Industry met in the International Labour Office on 9th and 10th December, 1929. Mr. Hilton (Great Britain) presided.

The following members were present: Mr. Labriola (Italy), Mr. Asli (India) and Mr. Yoshisaka (Japan), Government representatives; Mr. Forbes Watson (Great Britain), Mr. Soldini (Italy), Mr. Miajima (Japan) and Mr. Vanek (Czecho-Slovakia), employers' representatives; Mr. Müller (Germany), Mr. Caballero (Spain), Mr. Jouhaux (France) and Mr. Boothman (Great Britian), workers' representatives.

A number of experts were also present.

The business of the meeting was to examine the draft questionnaire prepared by the International Labour Office in accordance with the decision adopted by the Committee at its first meeting. The draft outlined a general scheme for the enquiry, which is to deal first with the cotton and wool industries, with special reference to wages and hours of work.

The Committee decided to add Canada and Estonia to the list of countries to be covered by the enquiry. The full list is now as follows: Austria, Belgium, Brazil, Canada, China, Czecho-Slovakia, Estonia, France, Germany, Great Britain, Hungary, India, Italy, Japan, Mexico, the Netherlands, Poland Rumania, Spain, Switzerland, the United States and Yugoslavia.

It was decided that the enquiry should be extended to cover as many undertakings as possible in each country. The information collected is to refer to a pay period selected at a time of normal working in each country and in each branch of the industry. The period may accordingly be chosen at different times in different countries, but should, as a rule, fall within defined limits a few months apart.

The Committee also determined the general method of the enquiry, and the branches of the industry and the classes of workers to be covered. On account of the large number of women and children employed in the textile industries, it was decided to subdivide all classes of workers into age groups, so as to obtain separate data for children, young persons and adults, and for the two sexes in each group.

The International Labour Office was requested to draw up the final text of the questionnaire, in accordance with the decisions of the Committee, for submission to the Governing Body at its next session in February 1930.

(Industrial and Labour Information.)

The Relationship of Linters to the Chemical Industries.

Governing Importance of Freedom from Foreign Matter.

The September issue of the *Cotton Oil Press* (the official monthly bulletin of the National Cotton-seed Products Association of the United States) contains an address delivered last June by Mr. Stewart E. Seaman, of the Dupont Rayon Co., to the Tri-State Oil Mill Superintendents' Association, the contents of which are of the first importance to all producers of linters.

Mr. Seaman says: "If you were to see the amount of trash contained in bales of linters received from different oil mills you would realize how important it is to spend more time in producing a better quality." This utterance from one engaged in the large-scale manipulation of lint products in the manufacture of artificial silk and other cellulose products is a valuable confirmation of the views expressed by Mr. Guy S. Meloy (of the United States Department of Agriculture) in a bulletin published by the Department two years ago, to which reference has already been made in the INTERNATIONAL COTTON BULLETIN.

Mr. Seaman stresses the fact that for a number of high-grade cellulose products a high-viscosity cellulose is essential; that the milder the chemical treatment in refining the raw linters to cellulose the higher the viscosity; that a mild chemical treatment connotes freedom from foreign matter in the lint products, and, conversely, that an impure lint product calls for drastic chemical treatment which produces a low-viscosity cellulose.

The non-expert reader may infer from this that the industrial value of linters falls just in the proportion that the percentage yield of cellulose is reduced by the quantity of foreign matter present. This, however, is by no means the case. A lint product yielding, for example, 70 per cent. of cellulose is worth considerably less than seven-eighths the value of a lint product yielding 80 per cent. cellulose for the following reasons: (*a*) over 14 per cent. *more* raw material (compared with a linter yielding 80 per cent.) has to be treated to produce an equal quantity of cellulose; (*b*) the output of the refining plant is thus reduced, which increases the cost of production per pound of refined product; (c) not only is a greater *quantity* of chemicals consumed, but the *strength* of the chemicals has to be increased in order effectively to remove the additional quantity of foreign matter in the increased quantity of raw material, which prejudicially affects the *quality* of the cellulose produced.

Thus an increase of foreign matter lowering the yield by one-eighth will cause a *decrease* in the industrial value of the refined product, and an *increase* in its cost of production, out of all proportion to the increase of foreign matter, and may, indeed, render the refined product valueless for certain purposes in competition with other materials because—as Mr. Seaman rightly observes—"the price will determine whether or not lint is used."

Mr. Seaman tells us that the cotton-purification plants in th United States "are consuming about 40 per cent. of the pr linter production, over half of which is going to the rayon industry," and it must not be forgotten that there are old-established markets for linters, on both sides of the Atlantic, in many industries other than the cellulose industries, so that, since the quantity of linters producible in the United States is not an unlimited one, there is a prospect of the market value of *clean* linters of all grades rising as time goes on.

The section of Mr. Seaman's address dealing with the cost of producing linters is interesting, and the four comparative tables he gives are very suggestive, but it will be realized that his assumptions that the cost of production per pound of linters remains the same for a given *total* cut per ton of seed, irrespective of whether it be obtained in one or more cuts, and that the cost of a higher or lower total cut will be affected only by the variation in the cost of power, must not be taken to hold good in all cases, so that his comparative figures of cost will not be universally applicable.

The rapidly increasing demand for cotton substance in the cellulose industries throughout the world has brought more and more into prominence the industrial value to be obtained from the short cotton fibres remaining upon most varieties of cotton-seed, and has already led to the installation of saw-linting machines in several British oil mills, whereby the double purpose is served of improving to some extent the physical condition of the woolly cotton-seed, grown in British cotton-growing possessions overseas, for the manufacture of oil and cake, and at the same time producing a commodity (linters) for which there is a large demand in Great Britain.

The linting of cotton-seed has been practised in the United States for upwards of 50 years past, but it is an almost new operation to most British seed crushers, who will find Mr. Seaman's lecture full of valuable information and data bearing upon the more important uses to which *clean* linters are put in the cellulose industries, and upon the reasons why the precautionary measures he recommends are of vital importance in the production of linters. British lintermen will do well to bear in mind Mr. Seaman's words: "The two factors you must watch are, quality first; cost second."

Mr. Seaman considers that the largest potential demand for a second or third cut of linters is for the manufacture of the viscose type of rayon, because "the viscose rayon process does not require fibre length, which is one of the major factors affecting the price of linters." But he points out at the same time that "the second cut, due to linting closer to the seed, carries more shell contamination, and, when the cotton is purified, requires a more drastic chemical treatment to remove the greater quantity of foreign matter." The degree of shell contamination is, naturally, more pronounced in a third-cut linter than in a second cut, because the shorter the fibres on the seed the tighter must be the roll in the saw-linting machine, which means increased pressure of the seed upon the teeth of the 106 saws in the linting machine, inevitably resulting in "particles of the seed-coat being rasped off by the delinting saws" (to which Mr. Meloy adverts in a valuable bulletin on the subject published in Washington, D.C., in November, 1927), and in lowering the grade and field of usefulness of the lint product.

We refer in another column to the equipment by the British Oil and Cake Mills Ltd. of one of their mills with a plant of "Segundo" cotton-seed defibrating machines, which remove the short fibres from the linted cotton-seed to any desired extent and deliver these fibres in a condition free from foreign matter. One of the salient features of these machines is that the removal of these residual cotton fibres is effected without recourse to saws, thus practically eliminating the source of "shell contamination" referred to by Mr. Seaman and Mr. Meloy.

Large Plant of "Segundo" Cotton-seed Defibrating Machines Erected by The British Oil and Cake Mills, Ltd.

In the INTERNATIONAL COTTON BULLETIN of July, 1927, there appeared an illustrated article descriptive of the improved "Segundo" cotton-seed defibrating machine.

During the early part of 1929 exhaustive trials of this machine were carried out by the British Oil and Cake Mills Ltd. at their Rochester mill, the results of which amply confirmed the figures published in the INTERNATIONAL COTTON BULLETIN, and thereupon the company decided to equip the mill with a plant capable of defibrating the whole of the cotton-seed that mill crushes.

Since this decision was taken, Mr. Segundo has been successful in further increasing the output without increasing the size or cost of the machine. In our article the performance of the machine was stated to be from 2½ to 3 tons of linted Uganda seed per 24 hours when removing a further 3 per cent. or so of fibre; it is now rather over 5 tons per 24 hours under similar defibrating conditions. The size and cost of the machine are unaltered.

The plant, which consists of 12 improved "Segundo" machines, is now in continuous operation day and night, and the whole installation was carried out by Mr. J. Norman Edwards, engineer of the mill, with his own staff.

The main objective of the preliminary trials was to determine the relative efficiencies of the defibrating process compared with the saw-linting process in recovering the short fibres remaining upon the woolly varieties of cotton-seed grown in British cotton-growing possessions overseas (notably in Uganda and Nigeria), after the high-grade linters had been obtained in the well-known saw-linting machines. The conclusions arrived at were that under appropriate conditions a very substantial advantage is gained by substituting the defibrating process for the "second-cut" linting operation in point of floor space occupied, power consumed, first cost and cost of maintenance, cost of renewals and upkeep (no saws are used in the "Segundo" machine), labour and superintendence, depreciation and quality of lint product.

The figures we have given in our previous references to the "Segundo" machine indicate that its lint product (to which the name "Seed-lint" has been given) is exceptionally free from foreign matter and other impurities. The degree of cleanliness of a lint product is a very important factor indeed in determining the price it will command in the market for the cellulose industries. We refer to this aspect of the matter elsewhere in this issue.

EFFICIENCY v. PROTECTION.

The *New Statesman*, Chicago, on August 3 last, published the following:—

We quote the following from a leading article in the *Wall Street Journal* of July 8. The italics are ours. It is perhaps necessary to add that the *Wall Street Journal* is not representative of any particular group which is interested in management. It is the principal financial daily in New York. It writes specifically of the textile industry of the United States: but its remarks have a wider application.

"*One of the evils of protection is that it tends to become a substitute for efficiency.*

For reasons of climate we have never been able to build up a linen industry in this country to compare with those of the West of Scotland, Belfast, or even Saxony. No industry has received higher protection than the manufacture of woollen goods, and yet people of only moderate means wear Scotch tweeds, West of England cloths, Bradford serges, cheviots and the like, because the quality is worth the difference in price, both in wear and in appearance. The idea of making people 'clothes-conscious' by wearing two suits of inferior quality, at superior prices, in place of one which would look good to the last, has not 'caught on.'

Our cotton goods manufacturers have received protection every time the Republican party has engineered a tariff advance in acknowledgment of favours received. In spite of the substantial increases of 1922, that industry in New England has scarcely been paying its way. The alternative seems to have been resort to cheap labour in the Southern cotton mills. It seems a decidedly un-American expedient, and hardly bears out the contention that the protective tariff is good for the worker.

What seems to be needed in the textile industries is not more protection but *reorganization with an axe, together with an improvement in quality, both in the product and in the conditions of the worker. Other industries have proved that good wages and working conditions wonderfully improve the per capita output, both in quantity and quality. Long ago, when other motor-car manufacturers without Ford's vision proposed to reduce wages below two dollars a day, Ford raised his minimum to five dollars and took the market away from them.* Protection is perhaps something of a necessary evil, but protection as a substitute for efficiency becomes less tolerable every day.

To take only one group, *all the textile manufacturers have shown Congress is that protection has failed to teach them their business.*"

COTTON BAGS FOR POTATOES.

The Cotton Textile Institute in New York report a steady increase in the use of cotton bags for packing potatoes in convenient quantities for retail distribution.

Reports from retail grocers in New York, New Jersey, Connecticut and Massachusetts indicate that housewives often prefer this type of package and are buying more of their household supply of potatoes in cotton bags this year than ever before. Approximately one-half the stores interviewed by the Institute in these four states are selling potatoes in this way. Of these more than 78 per cent favour cotton containers because they save time in serving customers and tend to increase the unit of sale.

Potato shippers state they have found three important advantages in favour of cotton bags. One advantage is that small cotton bags are easier to handle than other small containers. They have a further advantage of permitting a freer circulation of air and thus preventing decay which sometimes develops when certain types of closed containers are used and the packages are stored for any period. A third advantage lies in the improved appearance of the cotton bag.

A 15-lb. potato bag represents the use of about three-quarters of a square yard of fabric, which is important to the housewife-purchaser for its re-use value. The stencil lettering can be easily removed so that the bags when cleaned are suitable for use in the household.

The New Cotton Potato Sack.

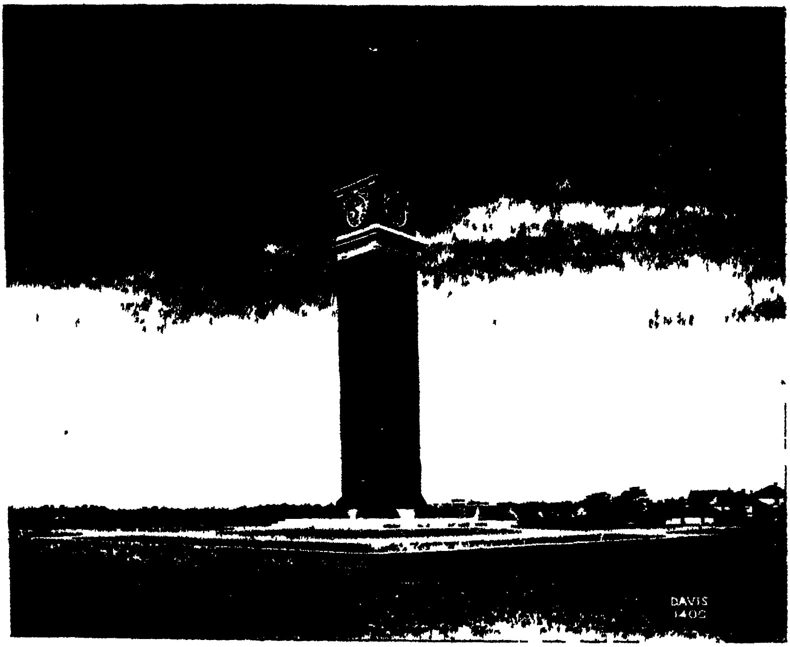
These small potato bags are usually made of plain unbleached materials, but experiments are being made by shippers in Idaho in using such colours as green or blue, in gingham checks, as a means of making packages more distinctive.

In connection with this market study the Institute is investigating the use of cotton bags for packing fruit and nuts in retail quantities.

FABRIC FOR MOTOR-CAR HOODS REQUIRED.

An opportunity for textile manufacturers exists in the perfection of a fabric, either coated or uncoated, which is better adapted for use in motor-car hoods, stated a speaker before the Detroit Society of Automotive Engineers when he asked the textile industry to devote intensive research towards the development of such a cloth. The average material in use to-day, he stated, if stretched sufficiently taut to present a neat appearance, shrinks excessively when exposed to hot weather; light-coloured materials so much in demand become dirty and discoloured. Some method will have to be found to prevent permeation of rain and wind-driven dust and dirt through the fabric. Whether a coating will accomplish it or whether a special material will have to be devised will be up to the textile manufacturer.

FULLER E. CALLOWAY MEMORIAL.



Employees of the cotton mills of Cason J. Callaway, at La Grange, Ga., have dedicated an impressive airplane beacon and clock tower which they themselves erected in memory of Fuller E. Callaway, founder of the mills and a pioneer in the cotton industry in the South. Mr. Callaway died two years ago.

WORLD ASPECTS OF UNEMPLOYMENT, 1930.

The League of Nations Union, 15, Grosvenor Crescent, London, S.W.1, is organizing at the London School of Economics on 25th, 26th and 27th February, a conference to deal with the above subject.

The conference is to be similar in scope to the conferences the League of Nations Union has held in previous years on questions of social insurance, arbitration and conciliation in industrial disputes, methods of fixing minimum wages, forced labour, etc.

Promises have been received from experts to speak on the different aspects of the problem; and those connected with the cotton industry who are desirous of taking part in the discussions are recommended to communicate with the Secretary, Mr. J. C. Maxwell Garnett, C.B.E., Sc.D.

THE LANCASHIRE COTTON FAIR.

The Lancashire Cotton Fair organized by the *Daily Dispatch* and conducted under the patronage of the Federation of Master Cotton Spinners' Associations, Ltd., the Cotton Spinners' and Manufacturers' Association, will be held at the City Exhibition Hall, Manchester, during the period February 11 to March 1. The main object of this exhibition is to stimulate the use of cotton goods, and is a direct result of the Resolution adopted at the Barcelona Cotton Congress referring to the extended use of cotton textiles.

Raw cotton, cotton yarns and fabrics, spinning and weaving machinery, etc., will be exhibited. A special feature will be a daily mannequin parade of cotton dresses.

Too late for classification.

The Fossick Bureau (Memphis), state, as per January 4, that:—

We do not believe the Government—14,919,000 bales, 500-lb. gross weight equivalents—as of December 1, overestimated the prospect; we believe the estimate was conservative, but bad weather since has been so persistent that it becomes a question of ability to salvage and of how much will be considered worth saving.

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COTTON TRADE STATISTICS

Distribution of the Cotton Spindles in the World.

Mr. W. H. Slater, writing in the *Textile Recorder*, gave some interesting figures on the distribution of the world's spindles. We reprint his article in part below.

In view of the great depression which persists in the cotton-spinning industry of most countries it is of interest to compare the pre-war spindleage position with that of the present time. The cotton-spinning industry of the world has reliable statistics at its disposal in the returns of the International Federation. The official statistics of cotton-spinning spindles contained in each country in 1913 and at the present time afford scope for some statistical analysis. Investigators outside the cotton industry raise the following primary questions:—

(1) What is the position to-day in each country compared with the pre-war position?

(2) What percentage shares of the world's spindleage were contained in the competing countries in 1913 and at the present time?

(3) What is the absolute spindleage increase and the percentage increase in each country since 1913?

(4) What percentage share in the world's spindleage increase has each country accounted for since 1913?

(5) What are the relative normal productive hours of work in each country?

These are not all the points that should be investigated, but they will help to throw light on many disputed points.

We have endeavoured to answer these points in Table No. 1 for all countries between 1913 and 1929, and for Continents in Table 2 in each case back to 1870. In the details we note an absolute increase in world's spindleage since 1913 of approximately 21 million spindles. The percentage share of Great Britain in this world increase was 1.76 per cent.; Continental countries accounted for 21.35 per cent.; Japan had 20 per cent. of the increase; India and China each had 12 per cent.; and the United States of America 16 per cent. It should be clearly noted that these figures

World Cotton Spinning Spindles for the Years 1913 and

Calculated from Inter-

(By W. H. SLATER, B.Sc.,

The competitive position of each country based upon spindle hours per week. The each country multiplied by the productive hours

Countries	1913	Percentage of World Total	1929	Percentage of World Total	Absolute Increase or Decrease from 1913
Europe:					
Great Britain ..	55,652,000	38·81	55,917,000	34·05	365,000
Germany ..	11,186,000	7·75	11,250,000	6·85	64,000
France (*a*) ..	7,400,000	5·16	9,880,000	6·02	2,480,000
Russia	7,668,000	5·35	7,465,000	4·55	−203,000
Italy	4,600,000	3·21	5,210,000	3·17	610,000
Austria (*b*) ..	4,909,000	3·42	955,000	2·91	−128,000
Hungary ..	(In Austria)	—	153,000	—	—
Czecho-Slovakia	(In Austria)	—	3,673,000	—	—
Belgium ..	1,492,000	1·04	2,156,000	1·31	664,000
Spain	2,000,000	1·39	1,875,000	1·14	−125,000
Portugal ..	480,000	d	503,000	d	23,000
Poland	1,322,000	·92	1,557,000	·95	235,000
Switzerland ..	1,398,000	·97	1,504,000	·92	106,000
Holland.. ..	479,000	d	1,160,000	·71	681,000
Sweden	534,000	d	626,000	d	92,000
Finland ..	222,000	d	262,000	d	40,000
Denmark ..	89,000	d	99,000	d	10,000
Norway ..	74,000	d	60,000	d	−14,000
Total Europe ..	99,505,000	69·38	104,305,000	63·52	4,800,000
Asia:					
India	6,084,000	4·24	8,704,000	5·30	2,620,000
Japan	2,300,000	1·60	6,530,000	3·98	4,230,000
China (*e*) ..	1,009,000	·71	3,602,000	2·19	2,593,000
Total Asia ..	9,393,000	6·55	18,836,000	11·47	9,443,000
America:					
U.S.A.	31,505,000	21·97	34,829,000	21·21	3,324,000
Canada	855,000	·60	1,240,000	·76	385,000
Mexico	700,000	·48	751,000	·46	51,000
Brazil	1,200,000	·84	2,750,000	1·67	1,550,000
Total American	34,260,000	23·89	39,570,000	24·10	5,310,000
Other Countries (*c*)..	291,000	·18	1,500,000	·90	1,209,000
Grand Total ..	143,449,000	100·00	164,211,000	100·0	20,762,000

(*a*) France gained 1,891,450 spindles in Alsace-Lorraine in 1919 from Germany.

(*b*) Contains Hungary and Czecho-Slovakia in 1913.

(*c*) Includes Esthonia, Lithuania and Yugo-Slavia in 1929, which gives minor discrepancies compared with Basic Record.

TABLE I

1929 together with World's Cotton Spinning Capacity

national Federation Returns.

Lancashire Statistical Service.)

item " Potential Spindle hours per week " means the total spindles contained in per week at which those spindles are normally run.

Percent. Increase or Decrease 1929 on 1913	Percent. share of world Increase or Decrease	Hours per week (*f*)	Potential Spindle hours per week for each country at present	Percentage share of world productive capacity based on weekly spindle hours if on full time	Countries
					Europe :
·66	1·76	47	2,628,099,000	26·76	Great Britain
13·69	12·25	53	596,250,000	6·07	Germany
		51	503,880,000	5·13	France
—2·64	—·98	70	522,550,000	5·32	Russia
13·26	2·94	52	270,920,000	2·76	Italy
—2·61	—·61	54	51,570,000	·53	Austria
—	—	55	8,415,000	·09	Hungary
—	—	54	47,142,000	·48	Czecho-Slovakia
44·50	3·20	50	107,800,000	1·10	Belgium
—6·25	—·60	70	131,250,000	1·33	Spain
4·79	·11	48	24,144,000	·20	Portugal
17·76	1·13	60	93,420,000	·95	Poland
7·57	·51	54	81,216,000	·83	Switzerland
142·14	3·28	54	62,640,000	·63	Holland
17·23	·44	54	33,804,000	·34	Sweden
1·80	·19	54	14,148,000	·14	Finland
11·23	·06	54	5,346,000	·05	Denmark
—18·91	—·08	54	3,240,000	·03	Norway
4·80	23·11	—	5,185,834,000	52·80	Total Europe
					Asia :
43·06	12·62	70	609,280,000	6·21	India
183·91	20·37	107	698,710,000	7·12	Japan
256·91	12·48	130	468,260,000	4·78	China
100·53	44·47	—	1,776,250,000	18·11	Total Asia
					America
10·55	16·01	70	2,438,030,000	24·82	U.S.A.
45·03	1·85	50	62,000,000	·63	Canada
5·86	·25	80	60,080,000	·62	Mexico
129·16	7·46	70	192,500,000	1·96	Brazil
15·50	25·57	—	2,752,610,000	28·03	Total America
415·41	5·85	70	105,000,000	1·06	Other Countries
14·46	100·00	—	9,819,694,000	100·00	Grand Total

(*d*) Less than half of one per cent.

(*e*) Estimated from a reliable source. In others in 1913.

(*f*) The hours per week refers to the "normal productive hours" for each country, and includes overtime and double shifts.

TABLE I

refer *to the percentage share of each country in the total world increase.* Table I shows very clearly the fallacy of taking percentage increase; e.g., Great Britain's absolute increase was 365,000 spindles, or only .66 per cent. increase in 1929 on their 1913 total. The increase of 681,000 spindles in Holland, however, means a percentage increase for them of 142 per cent. over 1913. The Asiatic spindleage increase of 8½ million means a percentage increase of 100 per cent. Brazil has doubled her spindles since 1913. The world cotton depression, however, is best seen at a glance in the second table, which shows annual average percentage share of the world's annual percentage spindleage increase expressed as 100. Up to 1913 the absolute *annual average* world spindleage increase rose from 1½ millions in 1870 to 1880 to over 3 million per annum from 1910 to 1913. Since 1920, however, the conditions have been such that, despite an actual total increase in the world's spindleage, the rate of increase per annum has consistently declined, until at the latest figures available for 1929 world spindleage annual increase now shows an actual decrease since 1928 of nearly 900,000 spindles.

EFFECT OF HOURS WORKED ON THE COMPETITIVE POSITION IN EACH COUNTRY.

The above analysis takes no account of the varying hours per week in each country. If we multiply the 1929 spindles for each country by the hours worked per week we then obtain the true competitive position *in spindle hours* per week. Thus, while Great Britain has 34 per cent. of the world's spindles, their competitive position is only 26 per cent., due to the 47-hour productive week. Asia, with only 11 per cent. of the world's spindles, is 18 per cent. competitive, due to a 94-hour week. America, with 24 per cent. of the world's spindles, is 28 per cent. competitive on a 69-hour week.

Year	Great Britain	Continent	Total American	Asia	World	Year
1870	37,700,000	12,838,000	7,132,000	1,130,000	58,800,000	1870
1880	43,000,000	18,885,000	10,653,000	1,492,000	74,000,000	1880
1890	44,500,000	26,353,000	14,188,000	3,659,000	88,700,000	1890
1900	46,500,000	32,225,000	20,610,000	6,802,000	107,395,000	1900
1910	53,397,000	41,167,000	30,804,000	9,126,000	134,434,000	1910
1913	55,653,000	43,733,000	34,271,000	9,393,000	143,449,000	1913
1920	58,692,000	43,385,000	39,392,000	12,162,000	154,201,000	1920
1925	57,116,000	44,008,000	42,012,000	17,390,000	161,363,000	1925
1926	57,286,000	45,645,000	42,075,000	17,519,000	163,723,000	1926
1927	57,325,000	46,267,000	41,312,000	18,234,000	164,597,000	1927
1928	57,136,000	47,768,000	40,146,000	18,479,000	165,103,000	1928
1929	56,748,000	48,021,000	39,966,000	18,666,000	165,104,000	1929 Jan.
1929	55,917,000	48,388,000	39,570,000	18,836,000	164,211,000	1929 July

TABLE II

THE WORLD'S POWER LOOMS.

Calculated by the Lancashire Statistical Service, from official sources, and Comtelburo Year-book.

(W. H. SLATER, B.Sc., TEXTILES, A.T.I.)

Countries	Looms 1913 or 1914	Percent. of World Total	Looms 1928 or 1929	Percent. of World Total	Absolute Increase in Looms '29–'13	Percent. Increase in Looms	Percent. Share of World Increase
Europe :							
Gt. Britain	805,452	28·69	739,887	23·75	—65,565	—8·13	—21·25
Germany ..	230,200	8·20	250,000	8·02	19,800	8·60	6·41
France (*a*)	108,000	3·85	192,600	6·18	84,600	78·33	27·42
Russia ..	213,179	7·59	159,100	5·11	—54,079	—25·37	—17·53
Italy ..	140,000	4·99	150,000	4·81	10,000	7·14	3·24
Austria (*b*)	170,000	6·06	27,186	4·40	—32,814	—19·30	—10·63
Hungary ..	In Austria		110,000				
Czecho-Slov.							
Belgium ..	24,000	·85	54,385	1·74	30,385	126·70	9·85
Spain ..	55,000	1·96	71,000	2·28	16,000	28·89	5·18
Portugal ..	12,000	·43	22,000	·71	10,000	83·33	3·24
Poland ..	31,000	1·11	42,274	1·36	11,274	36·37	3·65
Switzerland	21,555	·77	27,079	·87	5,524	25·63	1·80
Holland ..	39,800	1·42	52,000	1·68	12,200	30·65	3·95
Sweden ..	12,442	·44	16,000	·52	3,558	28·60	1·15
Finland ..	5,741	·21	7,000	·22	1,259	21·93	·42
Denmark	4,350	·15	5,891	·19	1,541	35·42	·50
Norway ..	2,385	·08	2,865	·09	481	20·18	·15
Total Europe ..	1,875,103	66·80	1,929,267	61·93	54,164	28·88	17·55
Asia :							
India (*d*) ..	94,136	3·35	166,532	5·34	72,396	76·90	23·46
Japan ..	20,634	·73	82,276	2·64	61,642	298·74	19·98
China (*e*) ..	5,852	·22	29,788	·96	23,936	409·02	7·76
Total Asia	120,622	4·30	278,596	8·94	157,974	130·96	51·20
America :							
U.S.A. ..	696,387	24·82	736,379	23·64	39,992	5·74	12·96
Canada ..	30,674	1·09	26,746	·86	—3,928	—12·80	—1·27
Mexico ..	27,019	·96	29,992	·96	2,973	11·00	·96
Brazil ..	50,000	1·78	79,249	2·54	29,249	58·50	9·48
Total America	804,080	28·65	872,366	28·00	68,286	8·49	22·13
Other Countries (*c*)	7,049	·25	35,175	1·13	28,126	399·01	9·12
Grand Total ..	2,806,854	100·00	3,115,404	100·00	308,550	10·99	100·00

(*a*) France gained 50,258 looms from Germany in Alsace-Lorraine in 1919.
(*b*) Contains Hungary and Czecho-Slovakia in 1913 and Hungary in 1929.
(*c*) Includes Esthonia, Lithuania and Yugo-Slavia in 1929.
(*d*) Excludes hand looms, officially estimated at 2,500,000 in 1927.
(*e*) Every family of any standing in addition has one hand loom.

ENGLAND.

YARN EXPORTS

Twelve months ended December 31

	1927 lb.	1928 lb.	1929 lb.
Russia	150,200	198,200	270,700
Sweden	1,410,200	1,786,700	1,511,000
Norway	3,334,700	3,205,900	3,407,200
Denmark	1,214,400	1,486,700	1,571,500
Poland (including Dantzig)	5,224,000	2,253,100	2,044,000
Germany	56,602,900	43,631,200	39,369,100
Netherlands	41,756,500	33,452,100	32,221,900
Belgium	8,592,800	5,768,000	6,325,100
France	3,824,700	4,174,800	5,854,500
Switzerland	10,411,800	9,089,900	8,024,500
Italy	506,400	982,300	1,308,200
Austria	1,355,600	1,334,800	1,497,900
Czecho-Slovakia	2,746,200	3,102,600	3,063,300
Serb-Croat-Slovene State	2,992,100	1,672,600	2,196,200
Bulgaria	3,033,300	2,388,000	1,513,200
Roumania	7,056,800	5,752,900	4,946,300
Turkey	693,200	740,900	523,300
China (including Hong Kong)	1,267,900	1,724,900	2,364,300
United States of America	2,988,000	2,360,800	2,458,100
Brazil	2,666,000	3,140,500	2,656,200
Argentine Republic	2,236,700	2,115,700	2,761,400
British India—			
Bombay via Karachi	751,700	627,900	479,100
„ „ Other Ports	7,929,900	8,461,900	7,839,700
„ Total	8,681,600	9,089,800	8,318,800
Madras	6,660,400	6,791,500	8,447,700
Bengal, Assam, Bihar and Orissa	5,262,900	4,960,500	4,031,000
Burmah	959,300	879,100	639,300
Straits Settlements and Malay States	273,600	225,800	218,500
Australia	5,508,700	4,360,100	6,327,200
Canada	1,478,300	1,800,300	1,685,700
Other countries	11,575,500	10,737,200	11,080,600
Counts Up to 40's	101,912,700	77,141,700	76,723,100
Over 40's up to 80's	72,317,400	66,485,900	66,191,000
Over 80's up to 120's	23,232,800	22,467,000	20,626,200
Over 120's	3,001,800	3,112,300	3,096,400
Grey, unbleached	179,319,900	150,162,200	146,957,500
Bleached and dyed	21,144,800	19,044,700	19,679,200
Total	200,464,700	169,206,900	166,636,700
Value	£23,608,368	£22,566,494	£20,753,279

The exports of cotton yarns in 1913 were 210,099,000, valued at £15,006,291.

CLOTH EXPORTS

Twelve months ended December 31.

	1927 sq. yds.	1928 sq. yds.	1929 sq. yds.
Sweden	25,895,000	21,801,300	16,585,300
Norway	17,308,700	14,551,300	15,856,100
Denmark	28,330,300	23,398,900	26,776,900
Germany	77,317,500	52,610,600	47,044,000
Netherlands	66,064,500	66,189,000	64,627,300
Belgium	30,296,900	24,417,500	26,418,600
France	14,562,500	12,226,900	9,346,200

CLOTH EXPORTS—*continued.*

	1927 sq. yds.	1928 sq. yds.	1929 sq. yds.
Switzerland	146,346,400	119,667,400	88,562,400
Portugal, Azores and Madeira	12,969,200	10,200,400	12,035,200
Italy	8,721,100	12,117,400	9,948,000
Greece	39,937,100	29,950,700	36,620,500
Roumania	16,815,700	14,883,000	11,140,700
Turkey	61,542,600	55,230,800	52,970,500
Syria	30,424,000	17,208,000	22,476,500
Egypt	159,883,900	128,670,300	151,619,300
Morocco	52,289,700	62,400,300	57,029,400
Foreign West Africa	53,420,500	64,412,200	57,221,000
Foreign East Africa	11,152,500	15,407,100	15,156,500
Iraq	80,139,400	48,536,300	38,878,900
Persia	18,540,600	18,721,300	13,522,200
Dutch East Indies	138,243,300	143,057,800	120,172,600
Philippine Islands and Guam	12,819,900	12,502,400	9,836,800
Siam	25,369,500	23,374,000	26,983,300
China	76,131,700	153,399,100	149,516,300
Japan	13,541,900	11,906,200	11,473,600
United States of America	47,075,900	38,945,800	34,005,800
Cuba	11,723,500	10,981,000	18,923,000
Mexico	11,202,100	16,400,500	15,134,500
Central America	13,089,000	14,043,500	16,230,600
Colombia	38,433,000	41,142,200	41,842,200
Venezuela	18,997,400	22,386,300	31,144,300
Ecuador	5,592,300	5,927,500	7,050,600
Peru	12,136,000	11,074,300	12,582,000
Chile	39,260,100	27,625,000	49,919,200
Brazil	61,016,700	55,191,500	37,447,800
Uruguay	16,018,700	19,746,200	18,102,000
Bolivia	3,219,300	2,856,500	3,657,100
Argentine Republic	131,177,400	148,922,300	144,152,200
British West Africa	144,444,900	146,015,500	123,607,100
British South Africa	73,180,900	69,189,600	71,681,400
British East Africa	18,442,400	18,457,200	18,756,400
British India—			
Bombay, via Karachi	290,833,500	328,959,500	227,708,400
„ „ Other Ports	285,212,400	358,693,700	284,269,500
„ Total	576,045,900	687,653,200	511,977,900
Madras	84,499,100	92,249,700	108,049,200
Bengal, Assam, Bihar and Orissa	924,941,700	710,112,300	687,826,200
Burmah	67,027,000	51,768,100	66,326,100
Straits Settlements and Malay States	77,560,400	62,560,600	82,929,400
Ceylon	35,754,100	26,064,200	31,554,100
Hong Kong	27,063,100	33,121,800	38,797,800
Australia	187,513,000	143,009,500	169,891,900
New Zealand	35,112,100	30,567,200	33,630,000
Canada	46,318,100	43,740,600	38,127,600
British West India Islands and British Guiana	23,676,300	22,160,000	19,290,800
Other Countries	168,298,200	157,747,400	147,231,200
Grey, Unbleached	1,302,997,200	1,084,139,700	1,033,821,100
Bleached	1,345,290,600	1,348,710,500	1,295,274,200
Printed	573,312,600	545,414,600	482,419,300
Dyed in the Piece	742,355,300	745,019,800	734,130,200
Manufactured of Dyed Yarn	152,927,300	143,215,100	126,041,700
Total Square yards	4,116,883,000	3,866,499,700	3,671,686,500
Linear yards	4,189,109,600	3,968,198,300	3,764,851,400
Cwts.	6,913,182	6,394,283	6,181,390
Value	£109,995,715	£107,298,462	£99,263,987

The 1913 exports of cloth were 7,075,252,000 linear yards, valued at £97,775,855

COTTON CLOTH PRODUCTION IN INDIA

(FOR SIX MONTHS ENDED SEPTEMBER, 1929)

GRAND TOTAL INDIA (BRITISH INDIA AND INDIAN STATES).

Description		Six Months, April to September		
		1927	1928	1929
Grey and bleached piece goods:				
Chadars ..	lbs.	14,104,220	8,261,895	11,074,976
	yds.	35,955,860	23,354,329	31,706,714
Dhutis .. .	lbs.	67,399,782	53,511,314	75,736,329
	yds.	322,629,411	256,906,490	376,138,403
Drills and jeans	lbs.	10,747,249	6,020,659	9,807,529
	yds.	42,387,583	24,794,230	39,342,526
Cambrics and lawns ..	lbs.	478,070	388,309	228,620
	yds.	2,759,997	2,112,797	1,382,766
Printers	lbs.	2,147,481	2,200,779	1,702,130
	yds.	9,420,759	10,633,937	7,955,834
Shirtings and longcloth	lbs.	72,739,313	38,046,944	57,848,168
	yds.	317,340,032	170,488,652	259,740,767
T-cloth, domestics and sheetings	lbs.	12,673,679	7,479,999	10,141,164
	yds.	47,628,783	30,269,933	39,353,121
Tent-cloth	lbs.	1,191,914	1,236,421	1,505,929
	yds.	2,775,835	2,934,061	3,693,910
Khadi, Dungri or Khaddar .. .	lbs.	21,531,818	11,478,585	17,694,819
	yds.	60,092,281	34,585,003	51,406,018
Other sorts .. .	lbs.	5,458,615	3,227,459	4,937,427
	yds.	22,591,668	13,628,040	19,649,243
Total	lbs.	208,472,141	131,852,364	190,677,091
	yds.	863,582,209	569,707,472	830,339,302
Coloured piece goods ..	lbs.	75,161,792	35,607,365	54,257,082
	yds.	339,281,234	168,338,897	256,904,362
Grey and coloured goods, other than piece goods	lbs.	2,037,194	1,110,632	2,057,314
	doz.	459,252	242,560	526,605
Hosiery	lbs.	586,391	733,851	1,066,644
	doz.	214,336	220,188	309,808
Miscellaneous	lbs.	3,122,948	1,918,252	2,476,243
Cotton goods mixed with silk or wool	lbs.	2,469,524	1,384,736	1,763,590
GRAND TOTAL ..	lbs.	291,849,990	172,607,200	252,297,964
	yds.	1,202,863,443	738,046,369	1,087,243,664
	doz.	673,588	462,748	836,413

COTTON YARN PRODUCTION IN INDIA

(FOR SIX MONTHS ENDED SEPTEMBER, 1929).

GRAND TOTAL, INDIA (BRITISH INDIA AND INDIAN STATES).

	Six Months, April to September		
Count or Number	1927	1928	1929
1	5,359,770	669,292	1,974,280
2	3,780,232	1,911,772	3,688,860
3	1,180,740	410,829	947,227
4	4,719,137	1,965,431	4,510,106
5	1,417,853	1,111,927	1,275,923
6	4,905,160	2,573,933	5,024,427
7	10,672,851	4,464,947	8,667,158
8	5,967,168	1,798,338	3,093,157
9	8,597,663	4,118,045	6,617,449
10	10,409,205	5,554,799	9,989,388
Total, Nos. 1 to 10 ..	57,009,779	24,579,313	45,787,975
11	18,387,774	11,409,476	15,452,196
12	14,611,067	8,232,903	11,738,177
13	13,521,515	9,426,005	12,699,187
14	16,601,308	8,595,221	13,339,267
15	11,628,188	7,101,572	11,629,424
16	17,269,828	10,898,888	15,918,724
17	10,503,062	5,165,514	7,509,054
18	12,112,707	8,662,637	12,118,940
19	7,713,944	5,992,215	6,542,807
20	78,384,116	46,887,970	66,193,974
Total, Nos. 11 to 20 ..	200,733,509	122,372,401	173,141,750
21	31,044,190	16,946,802	26,526,719
22	27,104,381	16,741,203	27,689,569
23	5,086,713	3,628,248	3,871,570
24	29,753,030	15,714,563	23,267,017
25	2,019,959	1,510,548	1,774,580
26	7,249,770	5,813,455	7,782,869
27	3,420,094	1,065,959	1,954,053
28	6,735,457	6,554,462	7,286,976
29	1,154,781	952,847	2,148,961
30	21,595,892	18,300,979	22,661,933
Total, Nos. 21 to 30 ..	135,164,267	87,229,066	124,964,247
31	816,398	1,031,343	1,233,489
32	6,381,895	5,976,103	8,062,536
33	944,022	384,328	549,018
34	884,200	882,491	1,160,295
35	115,313	83,598	296,714
36	1,459,026	561,445	1,119,704
37	23,440	66,666	169,388
38	156,022	96,619	263,044
39	—	25,927	36,839
40	5,748,626	5,314,408	9,211,138
Total, Nos. 3 to 40 ..	16,528,942	14,422,928	22,102,165
Above 40	6,040,886	3,794,582	7,408,309
Wastes, etc.	3,219,282	2,478,989	3,153,909
GRAND TOTAL	418,696,635	254,877,279	376,558,355

INDIA.

EXPORTS OF COTTON YARNS

(In thousands of lbs.)

Country of Destination	Aug. 1929	Sept. 1929	Oct. 1929	Jan.-Oct. 1929
Persia, Aden and Iraq	683	762	1,235	9,839
China	—	213	160	1,276
Egypt	317	628	530	4,381
Other countries	539	718	575	8,638
Total, 1929	1,539	2,321	2,500	24,134
„ 1928	781	778	1,313	16,047
„ 1927	2,240	2,091	1,332	23,054

EXPORTS OF COTTON PIECE GOODS

(In lakhs of yards).

Country of Destination	Aug. 1929	Sept. 1929	Oct. 1929	Jan.-Oct. 1929
Persia, Arabia, Aden and Iraq	40	49	52	390
Ceylon	13	16	28	169
Straits Settlements, Siam and China	23	23	17	193
East Africa (including Mauritius)	41	25	33	333
Other countries	16	19	15	145
Total, 1929	133	132	145	1,230
„ 1928	120	876	130	1,989
„ 1927	155	159	130	1,609

IMPORTS OF COTTON PIECE GOODS

Grey (In lakhs of yards).

Country of Origin	Aug. 1929	Sept. 1929	Oct. 1929	Jan.-Oct. 1929
United Kingdom	531	374	345	4,517
Japan	356	319	322	2,968
America	1	1	1	9
Other countries	18	13	2	155
Total, 1929	906	707	670	7,649
„ 1928	851	782	681	6,180
„ 1927	825	728	769	7,287

White (In lakhs of yards).

Country of Origin	Aug. 1929	Sept. 1929	Oct. 1929	Jan.-Oct. 1929
United Kingdom	355	394	245	3,940
Other countries	27	25	19	265
Total, 1929	382	419	264	4,205
„ 1928	487	430	422	4,972
„ 1927	450	367	335	4,985

(*A Lakh of yards = 100,000 yards*)

JAPAN.

EXPORTS OF COTTON CLOTH DURING THE FIRST NINE MONTHS OF 1929.

(Quantities in thousands of square yards ; values in thousands of yen).

	Unbleached		Bleached		Coloured, printed or dyed	
Classes and countries of destination	Square yds.	Value in yen	Square yds.	Value in yen	Square yds.	Value in yen
Cotton cloth :						
Sheeting..	133,543	28,827	333	77	—	—
Shirting	381,078	69,042	87,400	20,555	47,980	9,415
Drills	23,796	5,778	936	246	70,525	15,945
Jeans	23,831	5,451	4,331	1,073	122,289	30,344
T-cloth	9,374	1,942	428	95	27,813	5,565
Imitation nankeens ..	25,174	6,118	975	150	2,099	469
Canvas	1,998	1,010	—	—	1,015	382
Flannel	2,530	877	1,713	517	37,961	10,204
Crepe	—	—	6,388	1,260	18,518	3,455
Prints	—	—	—	—	44,377	8,842
Striped tissue	—	—	—	—	69,076	15,437
Satin	—	—	—	—	113,510	43,633
Mousseline de laine ..	1	(*)	—	—	12,078	2,599
Poplin	—	—	—	—	5,665	2,256
All other	1,256	206	1,524	406	61,518	21,941
Total	602,581	119,251	104,028	24,379	634,424	170,487
China, including Hong Kong	128,945	29,281	74,930	17,932	324,349	99,362
British India	304,572	54,302	11,318	2,350	98,817	23,097
Netherland E. Indies ..	35,393	6,390	8,504	2,005	102,251	24,004
Egypt	50,608	11,443	435	97	27,927	5,503
Other Africa	25,671	5,717	2,248	504	12,222	2,742
Australia	6,004	1,083	458	110	4,505	1,146
Singapore	1,184	292	1,491	307	19,939	3,921
Philippine Islands ..	1,015	199	2,132	483	17,455	3,489
Arabia and Persia ..	31,766	6,841	276	62	3,563	848
Siam	2,441	521	1,222	288	9,787	2,152
South America	11,510	2,518	574	149	8,533	2,066
Other countries	3,472	664	440	92	5,076	1,155

* Less than 1,000. (Compiled by U.S. Dept. of Commerce.)

IMPORTS OF RAW COTTON.

During the months of September and October, 1929, imports of raw cotton into Japan were as follows:—

	Running bales	Bales of 500 lbs.
Indian	148,677	118,941
American	93,400	92,933
Chinese	146,016	58,338
Egyptian	3,426	5,024
African	12,374	9,899
Rangoon	2,199	1,759
Others	2,601	1,387
Total	408,693	288,282

COTTON YARN EXPORTS FROM JAPAN (BY COUNTS AND COUNTRIES)

Total from Jan 1 to Oct 30, 1929
(In Bales of 400 lbs)

For	20's	16's	14's & below	32's	40's	42's	43's & above	Total
Shanghai ..	201	1	22	1,313	10½	695½	4,014½	6,257½
Tientsin ..	44	—	—	144½	5	621	281½	1,096
Tsingtau ..	23½	½	—	210½	—	631	1½	867
Dairen ..	1,377	6½	104	299½	1	320½	15½	2,124
Hankow ..	—	—	—	—	—	—	—	—
Manchuria ..	4,257½	44½	33½	553	4½	2,099½	83	7,075½
Other China ..	—	—	—	—	—	2	—	2
Hong Kong ..	878½	313	222	1,284	206	1,644	66½	4,614
Philippines ..	250	16½	17½	512½	505½	11½	250½	1,564
Singapore ..	12½	—	—	57½	25	—	27	122
Bombay ..	—	10½	—	286	1,095½	4,744	12,031½	17,167½
Calcutta ..	—	—	15	78	976	414	74	1,557
Other India ..	—	—	—	107	490	1,023½	786	2,406½
Dutch India ..	311	18	300	1½	877	41½	71½	1,620½
San Francisco	689	31	258	4	—	—	—	982
Central Am ..	1,393	26	282	1	12	—	3	1,717
Egypt.. ..	351½	—	—	—	25	28	8	412½
Others ..	1,314½	124	556½	18	76½	912½	23½	3,025½
Total ..	11,103	591½	1,810½	4,870	4,309½	13,188½	16,737½	52,610½

ARTIFICIAL SILK INFORMATION

YARNS AND PIECE GOODS

PRODUCTION—EXPORTS—IMPORTS—TARIFFS
MARKET REPORTS

APPLY:

The TEXTILE & ENGINEERING PRESS BUREAU Ltd.

(*Managing Director:* J GUTHRIE OLIVER)

'Phone, CITY 5225. **4, YORK ST., MANCHESTER**

RAYON

ESTIMATED PRODUCTION AND CONSUMPTION OF RAYON

(In 1,000 lbs.)

(Supplied by The Textile & Engineering Press Bureau, Ltd., Manchester.)

Country	Production	Imports	Exports	Consumption
Italy	59,000	1,423	38,624	21,799
Great Britain	53,100	1,619	8,220	46,499
Germany	45,000	19,692	18,359	46,333
France	37,000	781	12,505	25,276
Holland	20,000	3,240	19,512	3,728
Belgium	15,000	1,278	5,687	10,591
Switzerland	12,250	3,278	8,318	7,210
Poland	5,435	1,188	1,019	5,604
Czecho-Slovakia	4,250	8,512	2,202	10,560
Austria	3,620	2,495	2,816	3,299
Spain	2,000	4,800	—	6,800
Hungary	670	1,900	545	2,025
Others	1,000	4,593	—	5,593
Total Europe	258,325	—	—	195,317
Total Africa	—	1,200	—	1,200
Japan	18,000	386	8	18,378
China	—	19,800	—	19,800
India	—	8,145	—	8,145
Others	—	871	—	871
Total Asia	18,000	—	—	47,194
United States	131,325	16,388	254	147,459
Canada	3,750	2,500	—	6,250
Others	—	1,082	—	1,082
Total N. America	135,075	—	—	154,791
Total S. America	950	5,069	—	6,019
Australia	—	3,500	—	3,500
Grand Totals	412,350	—	—	408,021

WORLD PRODUCTION OF RAYON. (In 1,000 lbs.)

(Supplied by The Textile & Engineering Press Bureau, Ltd., Manchester).

	1929	1928	1927	1926
Austria	3,620	4,000	3,500	3,500
Belgium	15,000	15,000	13,500	13,100
Canada	3,750	3,500	2,600	2,250
Czecho-Slovakia	4,250	3,500	3,500	2,800
France	37,000	30,000	21,000	17,500
Germany	45,000	41,000	31,000	26,000
Great Britain	53,100	52,000	38,803	25,500
Holland	20,000	18,000	16,500	13,500
Italy	59,000	47,000	36,000	35,000
Japan	18,000	12,000	8,000	5,500
Poland	5,435	5,000	4,000	2,000
Spain	2,000	2,500	1,000	300
Switzerland	12,250	12,000	10,340	8,000
United States	131,325	98,650	75,050	62,575
All others	2,620	2,850	2,075	1,355
Total	412,350	347,000	266.868	219 080

ESTIMATED PRODUCTION OF RAYON BY COUNTRIES AND PROCESSES, 1929.

(In 1,000 lbs.)

(*Supplied by The Textile & Engineering Press Bureau, Ltd., Manchester.*)

Country	Total	Viscose	Acetate	Cupra.	Collodion
Great Britain	53,100	40,920	11,360	820	—
United States	131,325	114,025	7,000	2,300	8,000
Italy	59,000	56,900	1,000	1,100	—
Germany	45,000	33,200	800	11,000	
France	37,000	32,730	3,500	700	70
Holland	20,000	20,000	—	—	—
Japan	18,000	18,000	—	—	—
Belgium	15,000	10,700	1,500	—	2,800
Switzerland	12,250	12,250	—	—	—
Poland	5,435	3,635	—	—	1,800
Czecho-Slovakia ..	4,250	4,250	—	—	—
Canada	3,750	2,813	937	—	—
Austria	3,620	3,620	—	—	—
Spain	2,000	2,000	—	—	—
Brazil	950	950	—	—	—
Hungary	670	—	—	—	670
Greece	580	580	—	—	—
Sweden	420	420	—	—	—
Total	412,350	356,993	26,097	15,920	13,340
1928 Totals	347,000	292,920	25,100	13,950	15,030

BRITISH RAYON—EXPORTS AND IMPORTS.

	1929	1928	1927
Yarn:			
Imports in lbs.	2,150,714	2,884,860	2,700,776
Imports in £	506,470	640,045	589,955
Exports in lbs.	8,153,761	9,543,325	8,358,141
Exports in £	1,596,424	2,156,827	1,809,242
Rayon Hose:			
Imports in dozen pairs ..	1,035,501	547,851	—

MANUFACTURES—IMPORTS.

Wholly of Rayon:			
Tissues in lbs.	3,912,832	2,874,896	£5,535,207
Tissues in £	3,039,959	2,326,806	
Of Rayon Mixed:			
Tissues in lbs.	8,757,443	7,261,919	
Tissues in £	4,007,733	3,904,306	

MANUFACTURES—EXPORTS.

Wholly of Rayon:			
Tissues in lbs.	1,255,148	789,028	£5,787,706
Tissues in £	924,820	592,637	
Of Rayon Mixed:			
Tissues in lbs.	12,888,225	15,764,174	
Tissues in £	5,105,661	6,630,390	

Reviews on Current Cotton Literature.

"TRADE ORGANIZATION." Series 1, "Cotton Spinning," by F. Greenhalgh, A.M.I.E.E., published by the author, 68, Albert Road West, Bolton, Lancashire, at £5 5s. "Measurement is the key to efficiency and progress" is the motto of this book of nearly 300 pages, to which 37 charts are added. The author might almost have chosen Socrates' words: "*Nosce te ipsum.*"

The object of the system propounded is to bring about a common understanding of many of the factors which collectively produce what is termed "bad trade." To measure each contributory influence this system has been evolved after many years of painstaking enquiry in different channels. The book contains the following 26 chapters:—

Organization and efficiency; the problem in cotton spinning; capital; processes and expense sections; system of units; the chit system; salaries and wages; expense sheets; process costs; waste and moisture; production rates; production costs; cost balances; expense credits; warehouse; cotton; sales; the course of trade; reports for directors; stocktaking; weight reconciliation; investigation accounts; balance sheets; conclusions for cotton spinning; the cotton trade; staple industries; appendix.

This book is very plainly written and comprehensible to any bookkeeper; it is lucid and very carefully thought out. It shows how the losses—or profits—arising from inaccurate knowledge of costs, short-time working, low or high selling prices of yarn, and speculation in the purchase of cotton can each be identified at the end of every accounting period. A chapter is devoted to the application of the principles to the weaving and finishing branches of the cotton trade.

If every mill had a system of this kind in force, if the trade would adopt a standardization of costing practice, no doubt many losses, invisible in a haphazard method of cost calculation, only too frequently resorted to at present, would become evident and might be remedied.

The system of costing which is exemplified in detail is used as the basis for a scheme for trade organization among spinners through uniformity of administrative practice. By a general adoption of the proposals it appears possible that the present ruinous competition may at all events be mitigated.

The book is intended to be a practical instrument for the financial administration of cotton-spinning mills, and for co-operation among members of the same trade. A copy should be in the hands of the costing clerk in every cotton mill, but it can only find its way there if its importance is appreciated first by directors and managers, and it is primarily for their attention that the book has been written. It is intended not only for the cotton mills of Lancashire but for the whole world. A. S. P.

"THE COTTON SPINNERS' AND MANUFACTURERS' DIRECTORY FOR LANCASHIRE" (Forty-fifth edition), published by John Worrall Ltd., Central Works, Oldham, at 16s., is a very comprehensive directory of the cotton spinners, doublers, manufacturers, bleachers, dyers, finishers, situated in Lancashire. Other very useful chapters give lists of the managers, secretaries, and salesmen of each mill, fabrics and yarns produced, annual holidays, etc. It should be noted that a pocket edition of this directory is also published at 13s.

"INDIAN COTTON," a Review of the Season 1928-29, issued by Chunilal Mehta & Co., Bombay, is very interesting reading. The pamphlet contains valuable tables. This firm writes, as regards the prospects, as follows:—

> Looking ahead, the outlook for Indian cotton is much better than what it was last year at this time. We estimate the world carry-over of Indians on 1st September, 1929, at 2,225,000 bales, against 2,500,000 bales last year. The monthly rate of world consumption of Indian cotton is now about 440,000 bales, or 70,000 bales more than last year at this time. The Indian new crop progress is not yet advanced enough to express the yield in bales. Presuming that the crop is a normal one, we think that the carry-over of Indian cotton on 1st September, 1930, would be smaller than what we have this season. This feature should tend to bring our prices up in parity with Americans.

The second edition of COTTON DOUBLING AND TWISTING, Vol. I, by Sam Wakefield, (published by C. Nicholls & Co., Manchester).

The book has been written specially for students, and those actually engaged in cotton doubling and twisting.

Section I deals in logical order with the testing of the different types of yarns and thread, describes the various types of cop met with in practice, and analyses the systems of counting and conversions. Whilst the book deals very fully with the detailed tests and testing, an omission is the lack of full discussion on the dynamical shortcomings of most machines.

Section II on doubler winding will be very much appreciated by U.L.C.I. students.

The volume is well printed with good illustrations and contains much valuable data on constants, twists, etc.

The other three volumes dealing with flyer twisting, ring twisting, twine twisting, clearing, gassing, reeling, etc., are in the press. These four volumes are published at 30/-

W. H. S.

LANCASHIRE BETRAYED, by E. E. Canney, published by John Heywood Ltd., Manchester, at 3s. 6d. Mr. Canney discusses the reasons for the American cotton spinning section's loss of trade, or, in other words, its inability to meet foreign competition in the markets of the world. He points out the effect on the Lancashire cotton industry of the Great War, deflection, high cost of supplies and distributive charges, heavy local and national taxation, etc. He blames the cotton spinning industry for their present unenviable position in as far as their promotion of boom flotation, but he lays more blame on the national administration and suggests that the Government should now come to the aid of the cotton industry both financially and politically.

The author further makes a proposition that an enquiry should be conducted to show the great disparity still existing between the retail and wholesale prices of all commodities.

This book is really a compilation of lectures delivered by the

THE
Cotton Spinners' & Manufacturers' Directory for Lancashire

This Directory will make its 46th Annual Appearance in March, 1930

It will contain the following:

Details of approximately 2,500 firms in 43 Lancashire Towns; a full classification of more than 80 different cotton fabrics, with the names of the firms engaged in their manufacture; Alphabetical lists of more than 3,000 mill officials, and much other valuable information.

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author, and his unbiassed views should be studied by everybody who takes an interest in the welfare of Lancashire.

THE EMPIRE COTTON GROWING REVIEW for January, published by P. S. King & Son, Ltd., London, 1s. Contains technical articles on the Evolution of the Cotton Hair, by W. Youngman; Vicinism and Artificial Pollination in Egypt, by Trevor Trought; The Determination of Fineness of Egyptian Cotton and its Relation to Quality, by N. W. Barritt. The latter article should be of special interest to Egyptian cotton spinners.

DIE DEUTSCHE TEXTIL-INDUSTRIE, published by Verlag für Borsen und Finanzliteratur A. G., Berlin W. 35, at Marks 25.00.

This publication of 650 pages is a complete directory of the German Textile Industry. Each section of the industry is dealt with, viz.: Artificial Silk, Silk, Wool, Cotton, Bast Fibres, etc.

Full information on the history, capital, dividends, etc., is given for every textile firm existing in Germany.

BESTIMMUNGSGRÜNDE DER BAUMWOLLPREISE, by Otto Donner, published by Institut fur Konjunkturforschung, Berlin, at 6.80 Reichomarks, is a highly interesting publication to all engaged in the cotton industry. The author discusses the forces which control the price fluctuations of American cotton and illustrates his theories very fully with graphs. He also suggests the possibility of forecasting cotton prices and cotton acreage.

The author devotes a separate chapter to Indian cotton and another to Egyptian cotton.

Anyone interested in the cotton trade and having a knowledge of German should derive great benefit from a study of this publication.

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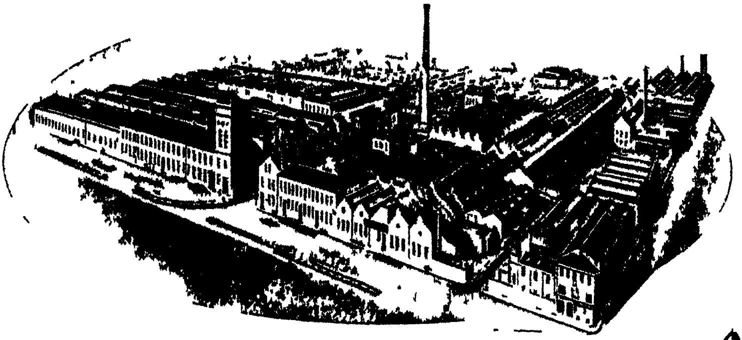
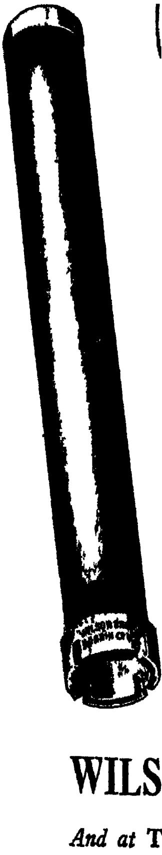
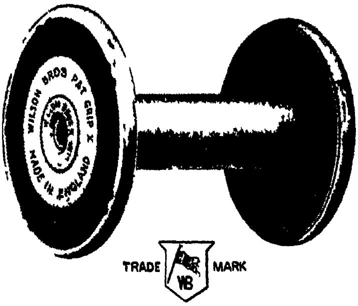
FOR THE TEXTILE TRADE



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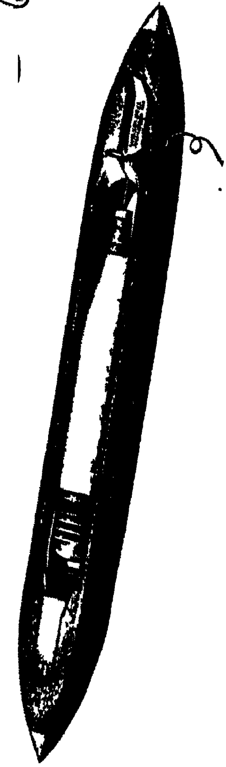

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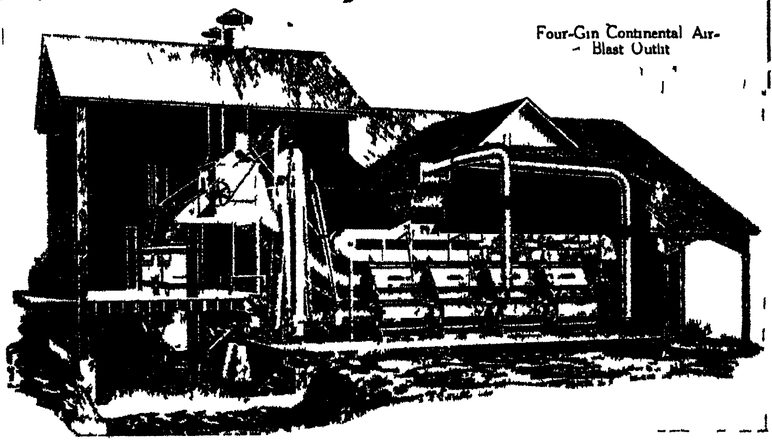

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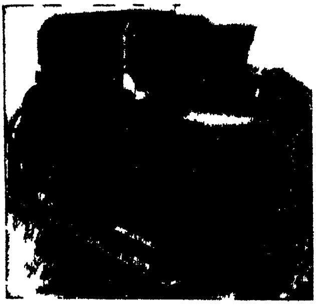

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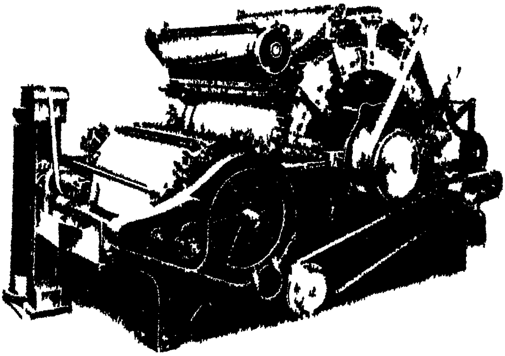

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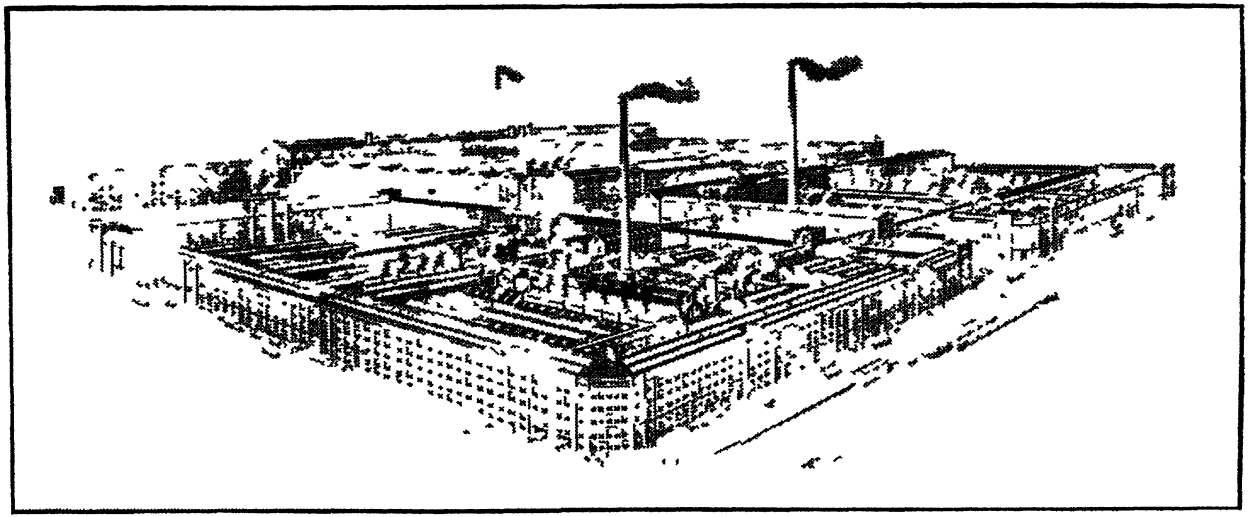

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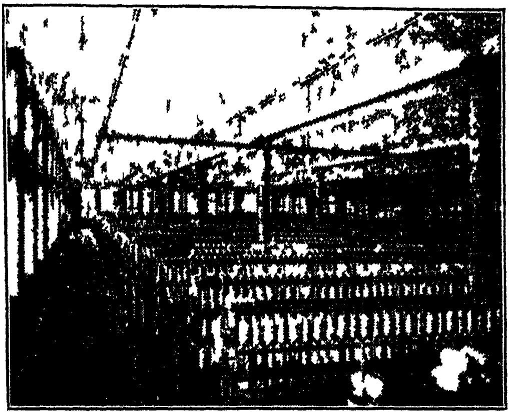

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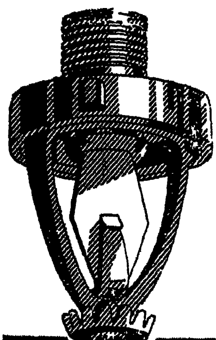

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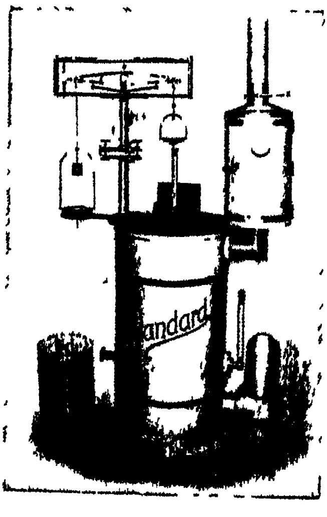

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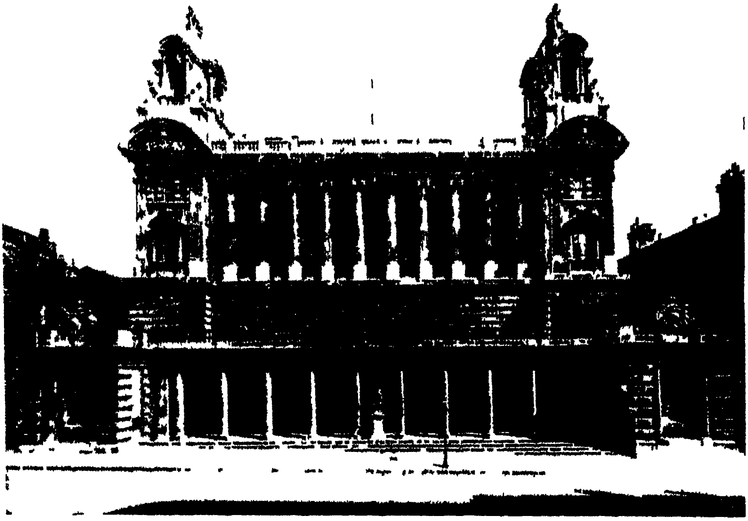

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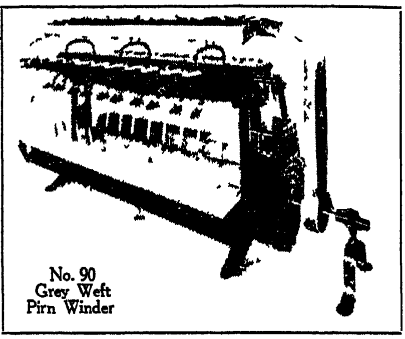

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The Cotton Industry *of* India

Mr. Arno S. Pearse, the General Secretary of the International Cotton Federation, has just returned from his tour through India, where he has been inspecting 40 mills in the different districts—Bombay, Ahmedabad, Delhi, Cawnpore, Calcutta and Madras.

He also had conferences with the leaders of the industry and important Government and commercial representatives.

Mr. Pearse's experiences and impressions will be published in book form early in July. Every affiliated mill will receive a free copy of this publication.

The price for non-members will be 21s.

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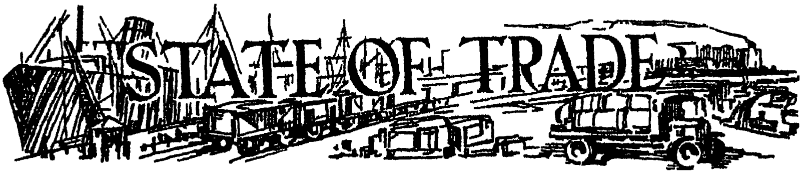

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AUSTRIA.

SPINNING SECTION

Austrian yarn production during the year 1929 was reduced by about 12 per cent as compared with 1928, and by 17 per cent in 1927 In the first three months of the present year a still further reduction which cannot be measured exactly has taken place

Exports of cotton yarn in the past year were in the neighbourhood of 108,000 metric quintals in contrast with 129,400 in 1928 and 144,400 in 1927 This reduction is equal to 16½ per cent of 1928 and 25.2 per cent of the 1927 exports

During the course of the last 18 months, altogether 290,000 spindles—29 per cent of the total—have been idle

The development of the business situation of the Austrian cotton-spinning industry is already suitably characterized by the foregoing figures, and it now only remains for us to remark that the reduced production—that meant for sale—is only disposed of at a loss.

The tendency of business is continually unsatisfactory and it is expected that increased short time will have to be worked

WEAVING SECTION.

The volume of production in the weaving industry is also in the course of an extraordinary decline, which is more easily realized when one states that of the existing 17,000 looms 3,400, or 20 per cent., are completely stopped During this time sales to the home industry have diminished by one-quarter but the import of cotton goods only fell 14 per cent in 1929 as compared with 1928

Therefore, the proportion of foreign goods in the home market is greater than it has been in the previous year

The disproportion between imports and home production is encouraged by the present form of the Austrian tariff, for which reason the industry is endeavouring to obtain an improvement in their customs duties

The price situation of cloths has developed continually unfavourably under the pressure of foreign and home offers, which naturally affects the profits of the mills Whilst during the last half-year only the grey goods manufacturers were feeling this

effect of this crisis in the market it has now spread to the coloured goods weavers, with the result that these mills also find it necessary to run short time The general situation is aggravated by the progressive relapse of the home consumption of cotton goods, which is chiefly due to the falling-off of the economic situation of the country

As the future holds no prospect of a considerable decrease in imports and an increase in home consumption, the outlook for the future continues unfavourable

The original text in German follows —

BAUMWOLLSPINNEREI

Die osterreich Garnproduktion ist im Jahre 1929 gegenuber dem vorausgegangenen Jahr um cca 12% zuruckgegangen, gegenuber 1927 um 17 8% In den ersten drei Monaten des laufenden Jahres ist ein weiterer Produktionsausfall eingetreten, dessen Ausmass ziffernmassig noch nicht genau festgestellt werden konnte

Die Ausfuhr von Baumwollgarnen hat im abgelaufenen Jahre rund 108 000 mq betragen gegenuber 129 400 im Jahre 1928 und gegenuber 144 400 im Jahre 1927, so dass der Ausfall betragt —

16·% gegenuber 1928 und
25 2 ,, 1927

Im Laufe von cca 1½ Jahren wurden insgesamt 290,000 Spindeln oder 29% des gesamten Spindelstandes stillgelegt

Mit den vorangefuhrten Ziffern ist die Entwicklung der Geschaftslage in der osterreich Baumwollspinnerei bereits entsprechend gekennzeichnet und es ware nur erganzend zu bemerken, dass die verringerte Produktion-soweit sie fur den Verkauf bestimmt ist- nach wie vor mit Verlustmarge abgesetzt wird Die Tendenz des Verkaufgeschaftes ist eine anhaltend unbefriedigende, so dass mit weiteren Betriebseinschrankungen gerechnet werden muss

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Auch der produktionsumfang der webindustrie ist in auffallender Ruckbildung begriffen, was in der Tatsache zum Ausdruck kommt, dass von den vorhandenen rund 17,000 Webstuhlen, derzeit ca 3400 Stuhle oder 20% abgestellt sind Wahrend sich demnach der Absatz der heimischen Industrie um cca ¼ verringert hat, ist die Gewebeeinfuhr von 1928 auf 1929 nur um cca 14% gefallen, Demnach ist heute der Anteil des Auslandes an der Deckung des Inlandgewebe-Bedarfes ein grosserer als er noch vor einem Jahre gewesen ist.

Das Missverhaltnis zwischen Import und Inlandsproduktion wird durch die Gestaltung des osterreich Zolltarifs begunstigt, weshalb die Industrie bemuht ist, eine Verbesserung ihres Zollschutzes durchzusetzen Die Preislage an Geweben entwickelt sich unter dem Drucke des in-und auslandischen Anbotes anhaltend

ungünstig, was naturgemäss auf die Rentabilität der Betriebe zurückwirkt. Wahrend bis vor cca. ½ Jahr nur die Rohwebereien von der Absatzkrise ergriffen waren, hat sich dieselbe nunmehr auch auf die Buntwebereien erstreckt, so dass diese Betriebe gleichfalls zu Einschränkungsmassnahmen gezwungen sind. Verscharft wird die Gesamtlage durch den fortschreitenden Rückgang des inländischen Gewebekonsums, was auf die bedeutende Verschlechterung in der Wirtschaftslage des Landes zurückzuführen ist.

Da für die nächste Zeit mit einer fühlbaren Verringerung der Einfuhr ebensowenig zu rechnen ist, wie mit einer Steigerung des Inlandsbedarfes, können die Aussichten der Webwarenindustrie auf eine Besserung ihrer Absatzlage nicht günstig beurteilt werden.

(*Verein der Baumwollspinner und Weber Osterreichs, Wein.*)

BELGIUM.

The low price of raw cotton during the last few months has not occasioned an increase in trade. Customers have refrained from buying because they hoped to see still lower prices; when the advance occurred it took away confidence in the market.

Stocks in the hands of spinners show a tendency to increase.

Export difficulties do not cease to increase, foreign competitors are selling at extremely low prices.

In the weaving section the situation is hardly satisfactory. Clients hesitate to place new orders, consequently the receipt of fresh business is very slow. A number of looms are stopped and there seems to be no prospect of any improvement in the near future.

The hosiery industry now appears to be suffering from the crisis.

The original text in French follows:—

La baisse profonde des cours du coton brut durant ces derniers mois n'a pas provoqué une reprise des affaires. La clientèle s'est abstenue parce qu'elle espérait voir des cours plus bas; lorsque la hausse s'est produite elle a manqué de confiance dans le raffermissement du marché.

Le stock en filature de coton a une tendance à augmenter.

Les difficultés de l'exportation ne cessent de s'accroître, la concurrence étrangère vendant à des prix extrêmement bas. ?

En tissage la situation est peu satisfaisante. La clientèle hésitate à prendre de nouveaux ordres et l'enlèvement des ordres en cours est fort lent. De nombreux métiers sont ârrêtés et l'on ne voit aucune amélioration dans un prochain avenir.

La bonneterie semble à son tour atteinte par la crise.

(*"Association Cotonnière" de Belgique.*)

FRANCE.

The improvement in the situation of the American cotton-spinning section during the last quarter of 1929, mentioned in the January number of the INTERNATIONAL COTTON BULLETIN, was purely seasonal and was not maintained. During the first quarter of 1930 the demand eased off and orders booked were undoubtedly for less than the production. In the meantime stocks are not yet very large and orders for delivery cover approximately the second quarter. Prices have given way and are not satisfactory.

The spinning of Egyptian cotton at the end of the quarter under review has become quite precarious in view of the declining situation. Stocks are increasing and the prices which are already very unsatisfactory are being depressed still further owing to the competition from English yarns.

As regards the weaving section, the situation reported by us in the last issue of the BULLETIN has deteriorated still further. Stocks are not equally distributed according to districts and types of cloth, and the prices obtained are very indifferent.

With the exception of minor adjustments in certain centres, there has been no change in wages.

The figures for imports and exports of cotton yarns and cloth will be found in the original French which follows:—

L'amélioration de la situation de la filature de coton "Amérique" signalée dans le N° de Janvier du Bulletin International pour le dernier trimestre de 1929 a été purement saisonnière et ne s'est pas maintenue. Pendant le premier trimestre de 1930 la demande s'est ralentie et les ordres pris ont été constamment inférieurs à la production. Les stocks ne sont cependant pas encore très importants et les engagements à livrer couvrent à peu près le 2ème trimestre. Les prix ont fléchi et ne donnent pas satisfaction.

La filature de coton égyptian, au cours du trimestre en revue, a vu sa situation décliner et devenir assez précaire. Les stocks sont en augmentation et les prix déjà peu satisfaisants sont encore avilis par la concurrence des filés anglais.

Quant au tissage, sa situation que nous signalions comme alourdie dans le dernier Bulletin s'est plutôt aggravée. Les stocks sont inégalement répartis suivant les régions et suivant les genres de tissue et les prix obtenus sont des plus médiocres.

Exception faite réajustements partiels intervenus dans certains centres, il n'y a eu dans aucune région de modification générale de salaires.

I. IMPORTATIONS (IMPORTS)

	4ème trimestre 1929 (Last Quarter of 1929)	Année entière (Twelve months of 1929)
	Quintaux métriques (metric quintals)	
Fils de coton (cotton yarns)	10,478	34,439
Tissus de coton (cotton cloths)	6,771	23,355

II. EXPORTATIONS (EXPORTS)

FILS DE COTON: Exportations totales (Cotton yarns: Total exports)	37,003	161,472
Principaux Pays de Destination: Principal countries of destination) :		
Algérie, Colonies françaises et pays de protectorat (Algeria and French Colonies and Protectorates)	4,078	14,893

	4ème trimestre 1929 (Last Quarter of 1929)	Année entière (Twelve months of 1929)
	Quintaux métriques (metric quintals)	
Allemagne (Germany)	4,949	32,885
Union Economique Belgo-Luxembourgeoise (Economic Union of Belgium and Luxemburg)	8,082	37,156
Pays-Bas (Holland)	3,582	16,119
Suisse (Switzerland)	4,737	18,243
Pologne (Poland)	1,963	6,407
République Argentine (Argentine)	1,677	5,593
TISSUS DE COTON : Exportations totales (Cotton cloths : Total exports	186,853	670,067
Principaux Pays de Destination : Principal countries of destination) :		
Algérie, Colonies françaises et pays de protectorat (Algeria and French Colonies and Protectorates)	129,942	410,866
Allemagne (Germany)	3,818	20,252
Angleterre (England)	8,140	34,818
Suisse (Switzerland)	4,775	28,711
Union Economique Belgo-Luxembourgeoise (Economic Union of Belgium and Luxemburg)	10,465	38,688
République Argentine (Argentine)	4,118	19,984
Etats-Unis (U.S.A.)	3,776	16,998
Pays-Bas (Holland)	1,367	6,646
Grèce (Greece)	1,278	4,732

(*Syndicat Général de l'Industrie Cotonnière Française.*)

GERMANY.

SPINNING SECTION.

No noteworthy alteration took place in the general condition of the German cotton-spinning industry during the first quarter of 1930. Business remained as inactive as previously. The general economic depression, and particularly the downward tendency of the raw cotton market during the first quarter, caused buyers to be cautious before taking definite steps. As a consequence only short dated sales were effected such as were necessary to cover the absolutely indispensable requirements of the yarn users. Purchases for future dates moved, on the other hand, within very narrow limits.

While the present general condition endures, restriction of output must continue to be maintained. Besides which the prices obtained were insufficient.

(*The original article in German follows*):—

SPINNEREI.

In der allgemeinen Lage der deutschen Baumwollspinnerei ist auch während des 1. Vierteljahres 1930 eine nennenswerte Veränderung nicht eingetreten. Die Geschäftstätigkeit blieb nach wie vor sehr schleppend. Die allgemeine wirtschaftliche Depression und namentlich die während des grössten Teils des 1. Quartals rückläufige Bewegung der Rohbaumwollmärkte veranlasste die Abnehmerschaft, mit ihren Dispositionen stark zurückzuhalten. Infolgedessen konnten nur kurzfristige, zur Deckung des unbedingt nötigen Bedarfes der Garnverbraucherschaft erforderliche Abschlüsse getätigt werden. Verkäufe für spätere Termine bewegten sich dagegen in sehr engen Grenzen.

Bei dieser allgemeinen Lage mussten die Betriebseinschränkungen weiterhin aufrecht erhalten werden; auch blieben die erzielten Verkaufspreise unauskömmlich.

(*Arbeitsausschuss der deutschen Baumwollspinnerverbände.*)

WEAVING SECTION.

The first quarter of 1930 has not brought any improvement in the condition of the South German cotton-weaving industry. The cautiousness on the part of buyers which had been accentuated to some extent by the violent fluctuations of the raw cotton market, as compared with previous months, is still in existence, so that only short-term contracts have been practicable. As a natural consequence the sum total of orders in hand at the end of the quarter is considerably less than we are accustomed to. The restriction in output which has been hitherto enforced has not resulted in any improvement, but the existing restrictions must be maintained for the future. Considering the difficulties in the way of disposing of stocks, it would be impossible to bring the price level on a healthier basis.

(*The original report in German follows*):—

WEBEREI.

Das 1. Quartal 1930 hat der süddeutschen Baumwollweberei eine Besserung der Lage nicht gebracht. Die Zurückhaltung in Abnehmerkreisen, die durch die starken Schwankungen des Rohstoffmarktes gegenüber früheren Monaten teilweise noch verschärft wurde, hielt weiterhin an, sodass im allgemeinen nur Kontrakte auf kürzere Sicht getätigt werden konnten. Demgemäss bleibt auch der am Schlusse des Vierteljahrs vorhandene Auftragsbestand weit hinter einem normalen Auftragsbestand zurück. Die durchgeführten Betriebseinschränkungen haben eine weitere Zunahme nicht erfahren, die bestehenden Einschränkungen werden aber auch für die Folgezeit aufrecht erhalten werden müssen. Angesichts der Absatzschwierigkeiten war es auch nicht möglich, das Preisniveau auf eine gesündere Grundlage zu brigen.

HUNGARY.

According to information received from the Statistical Office, the foreign trade of the year 1929 was as follows. For table of imports and exports see original German article which follows:—

The increase in the imports of raw cotton and the decrease in the imports of cotton yarns are explained by the fact that in 1929 three new cotton spinning mills commenced working in Hungary. Consequently, the home production is to-day for the most part meeting the home demand. The decrease in imports of finished cotton goods is no exception, for a similar reduction is discernible in all finished textiles. This is chiefly due to the reduced buying power of the home market. The export of cotton goods is composed chiefly of prints.

The situation in the cotton industry is unchanged. Although employment of the mills is excellent, the prices are depressed and selling conditions continue unfavourable.

Laut der Mitteilung des Statistischen Landesamtes gestaltetensich die Aussenhandelsdaten im Jahre 1929 wie folgt:—

Import	In 1,000 Pengo	In quintals	% im Vernhältnis zum Jahre 1928 Percentage average from 1928
Rohbaumwolle (raw cotton) ...	34,125	131,622	+ 46
Baumwollgarne (cotton yarns) ...	23,454	47,362	– 26
Baumwollgewebe (cotton cloths) ...	57,102	69,031	– 30
Von den Baumwollgeweben entfallen auf (the cotton cloths are divided as follows) :—			
Rohe Gewebe (grey cloths) ...	19,542	32,341	—
Gebleichte Gewebe (bleached cloths)	8,639	9,609	—
Gefärbte Gewebe (dyed cloths) ...	2,532	2,309	—
Buntgewebte u. Gedruckte Gewebe (coloured woven and prints) ...	14,516	14,555	—

Export	In 1,000 Pengo	In quintals	% im Vernhältnis zum Jahre 1928 Percentage average from 1928
Baumwollgarne (cotton yarns) ...	1,775	4,763	+ 18
Baumwollgewebe (cotton goods) ...	11,087	11,505	+ 6
Von den Baumwollgeweben entfallen auf (the cotton cloths are divided as follows) :—			
Rohe Gewebe (grey cloths) ...	91	146	—
Gebleichte Gewebe (bleached cloths)	291	353	—
Gefärbte Gewebe (dyed cloths) ...	485	525	—
Buntgewebte u. Gedruckte Gewebe (coloured woven and prints) ...	9,699	10,042	—

Die Steigerung in der Einfuhr von Rohbaumwolle bezw. der Rückgang in der Einfuhr der Baumwollgarne erklärt sich dadurch, dass im Jahre 1929 in Ungarn drei neue Baumwollspinnereien in Betrieb gesetzt wurden, Produktion heute bereits den grössten Teil des Inlandbedarfes zu decken vermag. Der Rückgang im Einfuhr der baumwollenen Fertigwaren ist keine vereinzelte Erscheinung, sondern kann eine ähnliche Importverminderung bei sämtlichen textilen Fertigwaren festgestellt werden. Diese Tatsache ist auf die sinkende Kaufkraft des Inlandmarktes zurückzuführen. Die Ausfuhr der Baumwollbranche besteht fast ausschiliesslich aus bedruckten Geweben.

Die Lage der Baumwollindustrie ist unverändert. Die Beschäftigung der Fabriken ist ausreichend, doch sind die Preise gedrückt und die Verkaufskonditionen dauernd un günstig.

(*Magyar Textilgyarosok Orszagos Egyesulete.*)

ITALY.

The fall in the price of cotton has rendered sales very difficult not only in this country but also abroad. The customers, being afraid of further falls, only buy in small quantities.

The present slackness is due principally to the reduced purchasing power of agricultural countries, due to the fall in price of agricultural products and to the cheapening of silver, which is preventing our manufacturers from exporting to the Asiatic markets.

To all this we must add the increasing development of the textile industry in many countries which up to now were among our best customers, and the increased tariff walls which protect these new industries.

The Italian import and export figures from the 1st of January to the 31st of October, in the years 1927, 1928, and 1929, as follows:—

	1929.		1928.		1927.	
	Q.li. (100 kilos.)	Lit	Q.li	Lit.	Q.li.	Lit.
Imports of Raw Cotton	2,000,149	1,812,021,136	1,809,356	1,796,837,455	1,732,582	1,418,809,859
Yarn exported	200,105	301,590,691	201,329	306,450,050	179,959	270,771,063
Cloth exported	506,550	1,238,020,166	457,059	1,191,242,213	429,978	1,215,334,245
Total	706,955	1,542,611,157	658,388	1,497,692,263	609,932	1,486,105,308

The Italian cotton industry, which spares no effort to resist all these drawbacks, so far has been able to maintain its mills almost entirely in a state of efficiency.

The profits from sales both at home and abroad continue, however, to be extremely small or nil.

SWITZERLAND.

The short-time movement and the entire closing down of some mills have increased in the spinning, doubling and weaving sections. In spite of this reduced production, however, no signs of improvement can be forecasted. Business requires a normal basis, which is lacking. The position described in our last report unfortunately portrays the present situation in every respect.

The original German text follows:—

Die Produktionseinschränkungen und gänzlichen Betriebsstillegungen haben im Vergleich zum Vorquartal weiterzugenommen in der Spinnerei und Zwirnerei sowohl, als in der Weberei, ohne dass ein baldiger Stillstand der Abbaubewegung abzusehen wäre. Dem Geschäft fehlt nach wie vor eine normale Basis. Die im letzten Bericht geschilderte Lage trifft leider im vollem Umfang noch auf die derzeitige Situation zu.

(*Schweizerischer Spinner, Zwirner und Weber Verein.*)

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COTTON GROWING IN NEW COUNTRIES

ARGENTINE.

Reports from the cotton growing districts indicate a larger cotton acreage for the 1929-30 cotton crop, according to the trade press. It is believed that about 300,000 acres will be planted against 260,000 acres last year. The cotton for the 1928-29 season is said to have been of good quality as growers are reported to have secured good prices.

(U.S. Department of Commerce.)

AUSTRALIA.

The 1930 cotton crop is estimated by local growers to be about 30 per cent. larger than the previous season.

(U.S. Department of Commerce.)

A recent Reuter's Cable from Brisbane stated that Mr. Walker, Queensland Minister of Agriculture, in announcing that an agreement had been reached for the Cotton Board, on behalf of the growers belonging to the British and Australian Cotton Association, to take over ginneries and oil mills and thus place the enterprise on a co-operative basis, said the Government had given careful consideration to the future of the cotton industry, and after exhaustive examination had ascertained that the yield per acre compared more than favourably with the yield in the United States, that the average crop was superior, and the average value 85 points above American middling. Production costs compared very favourably.

The association had six ginneries throughout Queensland and an oil mill near Brisbane. The purchase price has been agreed upon at £137,500. An additional £18,000 will be spent on modernizing the equipment.

Advices received from Sydney state that the Federal Prime Minister has announced his intention to provide for the continuance of the cotton bounties to cotton planters for five years from August, when the present bounty expires.

The bounty varies in diminishing amounts from 1½d. to ½d. a pound, disappearing in 1936.

ECUADOR.

COTTON CROP.

The cotton crop for 1929-30 is estimated by growers at about 3,000,000 pounds, which is considerably larger than last year. Although the crop is larger, it is said that mills will require an additional thousand bales of cotton from foreign countries.

(*Foreign Crops and Markets.*)

HAITI.

The 1930 cotton crop is estimated by local growers to be as large as the previous year when production amounted to about 21,000 bales. Most of the cotton grown in Haiti is shipped to France and Great Britain.

(*U.S. Department of Commerce.*)

ITALY.

The Central Institute of Statistics has recently made an inquiry on cotton cultivation in Italy which is found to be of still very moderate extent. The area cultivated with cotton in 1929-30 was 7,800 acres and production of ginned cotton amounted to 14,900 centals (3,100 bales). The most recent figures for comparison are for the area in 1927-28 (9,900 acres) and production in 1924-25 (21,600 centals or 4,500 bales) and show a reduction instead of a development in cultivation.

PARAGUAY.

COTTON CROP.

The acreage planted to the crop of this season is estimated by growers at about 60,000 acres. Weather conditions were reported as good, and some officials estimate that the crop will amount to about 16,000 to 17,000 bales.

(*Foreign Crops and Markets.*)

PERU.

COTTON CROP.

Advices to hand state that most of the cotton valleys in Peru have a sufficient supply of water, and a good yield is anticipated this coming season.

COTTON EXPORTS.

The exports of cotton from Peru during November amounted to about 18,000 bales against 23,000 bales in October and 29,000 bales in September, according to the National Agricultural Society.

(Assistant Commercial Attaché Julian D. Smith, Lima, January 24.)

SUDAN.

The Department of Agriculture and Forests of the Sudan Government issue the following Cotton Progress Report for the month of February, 1930:—

Variety	Area under crop (feddans)	Picked to date (kantars of 315 rottles)	Estimated total (kantars of 315 rottles)
Gezira Sakel	174,000	176,936	376,750
Tokar Sakel	45,000	1,000	41,300
Kassala Sakel	55,500	35,000	100,000
Shambat, Kamlin and Dueim Sakel	850	1,694	2,450
Private Estates Sakel	3,960	3,500	9,000
Total Sakel	279,310	218,130	529,500
Irrigated American	17,615	42,312	50,059
Rain Grown ,,	58,650	59,387	67,970

ST. VINCENT (British West Indies)

The cotton area for the season 1929-30 is about 1,700 acres or half of that cultivated in the season 1928-29 (3,400 acres) and about 40 per cent. of the average area of the preceding five years (4,200 acres). The crops have a generally satisfactory appearance. Small quantities of bottom bolls opened in the last week of December and have been picked. *(I.I.A.)*

TURKEY.

The cotton crop in the Smyrna district for last year is estimated at about 40,000 bales, or an increase of roughly 30 per cent. over last year's crop.

UGANDA.

EXPORT TAX ON GINNED COTTON.

A recent Notification (No. 719 of 1929) announces that in accordance with the Cotton Tax Ordinance of 1927 the amount of tax payable in respect of ginned cotton exported from Uganda during 1930 will be 5 cents per lb.

H.M. Eastern African Dependencies' Trade and Information Office has received from East Africa a cable giving the following figures of exports for the 12 months ending December, 1929:—

Cotton	1928 Centals	1929 Centals	Increase	Decrease
From Kenya	2,527	803	-	1,724
From Uganda	553,944	816,229	262,285	–

WORLD'S PROBABLE PRODUCTION, 1929-30.

The New York Cotton Exchange Service estimate that the world's cotton crop for the season 1929-30 will amount to 25,998,000 bales of 478 lbs.

The chief countries of production are listed in the table below:—

	1921–22	1922–23	1923–24	1924–25	1925–26	1926–27	1927–28	1928–29	1929-30*
American	8,215	10,087	10,310	13,980	16,131	18,046	12,827	14,522	14,919
Egyptian	1,059	1,143	1,309	1,459	1,711	1,628	1,242	1,649	1,649
Indian	3,668	4,241	4,446	4,885	4,600	4,102	4,506	4,606	4,480
Sundries:									
Chinese	1,056	1,342	1,453	1,497	1,424	1,433	1,849	1,542	1,550
Brazilian	405	444	463	640	483	374	410	433	550
Russian	43	55	260	521	737	738	983	1,208	1,325
Peruvian	191	202	201	185	230	262	215	218	210
Mexican†	93	132	111	236	178	267	156	187	185
Others	350	475	625	825	1,045	890	995	1,137	1,130
Total sundries	2,138	2,650	3,113	3,904	4,103	3,973	4,608	4,725	4,050
All cottons	15,080	18,121	19,178	24,228	26,545	27,749	23,183	25,502	25,998

* Preliminary.

† Excluding exports to United States, as these are counted in American production.

The Cotton Trust of Central Asia.

The "Textile Recorder" publishes the following article by Anna Louise Strong, Ph.D. (Tashkent), on the Cotton Trust in Central Asia.

One of the largest cotton trusts in the world has sprung into being in the past eight years in Central Asia. Its yearly turnover is 335 million roubles (34 million pounds sterling), of which more than 200 million goes direct to peasants for the purchase of raw cotton. The yearly fixing of its prices is a matter of economic life and death to two Central Asiatic Republics, and the contest over them between the representatives of the Cotton Committee and the representatives of four million peasants often becomes a matter of high political moment even in Moscow, the centre of the Soviet Union.

Nor is cotton purchase the only activity of this cotton trust. Three-quarters of a million tons (3,360,000 bales of 50 lb. each), of raw cotton pass through its sixty three cotton ginning factories; the seeds of all this cotton go to its nine giant cotton-seed oil factories; in a large number of farms the same Cotton Committee raises and improves the seed which supplies all Central Asia. Its new machine factory supplies Central Asia with cotton gins; its building department spends millions annually for the building of new factories. It has, in short, the monopoly on everything connected with cotton in the Soviet Union.

The Cotton Committee which wields the power is a state organization of the Soviet Union. But its function is not political; its staff is by no means composed of communists. A certain number of communists there are, of course, in important posts to represent the political government; but the rest of the management and staff is composed of cotton experts, men who have been at work in cotton in Central Asia for as long as thirty years. Engineers, argriculturists, scientists, administrators make up the directing organization.

The Cotton Committee is therefore a business organization, a trust, functioning not unlike capitalist trusts anywhere. It has a capitalization of 85 million roubles (£9,000,000) representing all its many properties, but without counting land values, since "land is reckoned as nothing," or as air and water, in Soviet Union capitalization. It enters as major stock-holder into three subsidiary companies, the Cotton Committees of Uzbekistan, Turkmenistan and Kasakstan, the minor stock being held by the governments of those republics. On this stock it is expected to make a profit and does so; its assistant director in Tashkent assured the writer that they had not to apply to the government to make good any deficits.

Such is the organization built in 1920-21, to meet a situation of utter ruin in the cotton growing of Turkestan. War, civil war, endless local banditry and famine had wrought more complete havoc with the delicate adjustments of Central Asiatic irrigated districts than even in the grain-growing plains of northern Russia. The irrigated area fell from 3,800,000 hectares to 1,600,000 hectares in 1922, as nearly as can be reckoned from statistics which were bad in both periods.

The importance of cotton in Central Asia may be seen from the following figures. In Uzbekistan, the central Republic including Tashkent, Samarkand and Bokhara, cotton forms 46.7 per cent. of the marketable agricultural produce, and the working over of cotton products forms 47.3 per cent. of all industry. Uzbekistan is, therefore, a cotton republic, and must import a large part of its breadstuffs. Yearly, its dependence on cotton increases and its wheat lands diminish under the stimulus of special credits and tax reductions on cotton lands, it being the policy of the Soviet Union to produce ultimately all its cotton within its own borders, an object which is this year from 60 to 70 per cent. attained.

Some five miles in the country from the city of Tashkent is situated the 300-acre Selection Station where new varieties of the cotton plant are being produced under the direction of Professor Zaitsev, who worked in Turkestan before the war as an expert of the Tsarist Department of Agriculture and is now working also as a scientific expert on cotton under the soviets. Formerly there were only two or three scientific workers under the Department of Agriculture. Now, of course, it is much grown. It began to grow in 1920 when the Cotton Committee was formed; but the real impetus came in 1923 when the experimental station passed entirely into the hands of the Cotton Committee. Since that time it has been on a solid financial basis; this year's budget is half a million roubles. It is really well equipped and new building is proceeding continuously.

When Professor Zaitsev took charge of the experiment station near Tashkent in 1919, there was a total population of 20 souls, including workers and servants. To-day with the scientists, clerks, workers and their families, the Selection Station is a little community of 600 people, maintaining its own school, club, many radio receivers, cinema, central dining hall, in addition to scores of newly built quarters for the staff. The central laboratory, built in 1923, is already overcrowded. There is also in process of construction a new barn, a new club building and additions to the greenhouse, while this year there is to be built a small spinning factory for scientific testing of the spinning qualities of various cottons.

Professor Zaitsev has developed a new variety of cotton which will grow further north than any known variety; it pays for this quality by a short staple and a productivity less than the others, but it is still industrially valuable for the irrigated steppes of Kasakstan. Other varieties of heavy productivity and long staple have been developed for the hot oasis of Turkmenia near the Persian border. Still others are in process of breeding. From three to 10 years is spent on a new variety; then it is given to the big seed farms of the Cotton Committee, which test it on a large scale, and distribute the seed to the peasants.

An hour's ride south of Tashkent on the train for Samarkand, lies the Fertilizer Experiment Station, also with 30 scientists and many helpers testing fertilizers in a large greenhouse and in a field of 150 acres. Here, also, are many new buildings. A field is divided by little white posts into sections of 200 square metres, in each of which a different dose of fertilizer is used. There are 3,500 such sections. Here are carried on laboratory examinations of soil from all parts of Central Asia, to determine what sort of treatment each soil requires. Expeditions also travel from this station to all parts of Central Asia, to locate possible supplies of fertilizing chemicals, so that import may not be needed. Special attention is paid to the use of cotton-seed refuse as a fertilizer since this is obviously the cheapest and most available product; studies are made into the chemicals needed to supplement it.

Steadily, year by year, Pakhta Aral has grown since 1925 when the Cotton Committee took it over. In that year it planted 4,646 hectares, and last year 9,275. Its capital investment has increased from less than a million to over four million roubles, which, with two million working capital last year, gives a total investment of over six million. Land values are, of course, not reckoned. Its annual profit is, however, small: only two per cent. on its investment this year, when early frosts injured the cotton crop, and seven per cent. the previous year, when the crop was a good one. Pakhta Aral is, moreover, the only one of the farms of the Cotton Committee which makes any profit at all; the rest lose money. Part of this may be explained by the fact that their policy is to supply choice cotton-seed at prices no higher than the ordinary seed left over from the cotton gins; part of it is due to the fact that in cotton growing large-scale farming has not yet proved able to compete with native peasants on a low standard of living; and part must undoubtedly be laid to the expensive management characteristic of Soviet farms.

The Experimental Factory in Tashkent is not a large factory—some dozen cotton gins in all, of perhaps 10 different varieties. It is run at a loss, being primarily a scientific station rather than a production mechanism. It tests in the first place cotton gins, importing various models, trying them at various speeds and with various loadings, and on this basis giving orders for the improvement of gin-manufacture in the machine factory of the Cotton Committee. It also tests temperatures and moistures at which cotton can be profitably ginned, attempting thus to extend the months of ginning from the present five or six months of seasonable labour to a 10-month period. Hitherto, this has been deemed impossible, on account of the dry heat conditions of Central Asia summers; the Experimental Factory finds these difficulties not insurmountable and is working at the proper conditions of ventilation, etc., which will make the work both endurable for workers and for the cotton.

Many other questions are studied; the best method of cleaning various kinds of cotton to preserve the length of staple, which too rapid cleaning breaks, while too slow cleaning is wasteful; methods of drying cotton that has too much moisture, and of moistening cotton that is too dry! Machines for determining moisture content; methods of getting rid of dust in cotton ginning; how many wires and of what strength are needed for adequate binding of cotton bales; the testing of cotton from various regions as to tensile strength, length and process of ripening. The results of these tests and investigations are applied in the 63 cotton ginning mills of the Cotton Committee.

The chief task is to improve the Soviet brand of cotton gins. Already Russia has ceased to import cotton gins, except for experiment. Their own are now better adapted to their purposes. For each of their machines they work out the proper speeds and loading for each type of Central Asiatic cotton, which is also now more standardized than the cotton they can buy in America. Some incredulity may be felt at this amazing statement, but the manager explained that since all marketed cotton is grown on contract with the Cotton Committee, which in turn supplies all seeds, it is possible for the Textile Syndicate of Moscow to order a variety of cotton by number and get the entire crop of a given region, all of one kind as to length, tensile strength, and other qualities, even though produced by illiterate native peasants. To such modernity of standardization has the Cotton Committee brought this formerly chaotic region.

Mr. Nikolsky, for 30 years engaged in cotton in Central Asia, and at present the assistant chief of the Cotton Committee's activities at Tashkent (it must be remembered that the Committee has also a branch in the Caucasus and a main headquarters in Moscow), outlined the history of cotton growing in Central Asia. The plant first came to Tashkent, not from India as has been supposed, but from Africa via Persia, as has been proved by the classifications of the Selection Station In its native form, known as Guza, it has a hard closed boll of short staple, and requires less work and less water than the more marketable 'American' cotton The latter was already introduced widely in Central Asia in Tsarist days, but not always successfully, since in the northern sections of Turkestan the summers were too short for it The varieties now sown are none of them pure American types but adaptations bred by the Selection Station For market purposes they have almost entirely replaced the Guza though the peasant still plants some of the latter for his home spinning, for the sweeter oil it gives him in home manufacture and for its use as cattle fodder

The largest harvest per acre comes from the smaller holdings But this harvest is the most expensive in labour, if the peasant counted the time of his family spent in the cotton fields, he would be getting less per hour than the hired worker on the farms However, under the general conditions of life in peasant households he finds this labour profitable, and more so than with other crops The Cotton Committee takes care that it remains so by fixing the prices and terms to encourage the increased planting of cotton They base their calculations first on the estimates of agronoms and engineers in all parts of Central Asia, as to the labour cost each year in producing cotton, secondly, on budget facts of family living gathered by their statisticians They consider their data objective, as their interest lies in maintaining a stable cotton crop

This year the peasant is being paid for raw cotton an average of 4 60 roubles per pood—3 25d per lb (Russian pood = 36 English lbs) In pre-war days he got 3 60 to 3 70 Since the purchasing power of the rouble is now much less, he would now be getting less purchasing power than formerly To offset this, the state gives subsidized grain to the cotton growers, at 1 50 roubles per pood instead of the universal cost of 2 10 or 2 20 per pood The State finds this cheaper than raising the cost of cotton, it enables the peasant to buy more wheat per pood for his cotton crop than he got before the war He also gets long term credits on very good terms for his purchases of implements In general he is given extensive credits during all the months of cotton growing at 6 per cent annual interest, whereas formerly he had to finance himself or go to the very exorbitant local money lenders

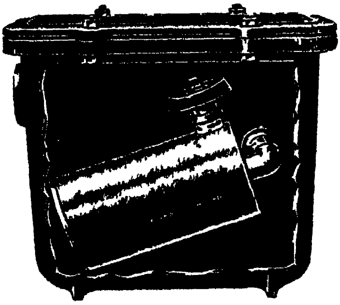
That the peasant is at least fairly satisfied with these prices and conditions is shown by the fact that the land planted to cotton grows steadily, at the rate of nearly 20 per cent for each of the past two years

There is no doubt that the cotton area of Central Asia is steadily growing, that productivity is growing, and standardization growing In these matters the giant cotton trust is fulfilling its task But when one applies the usual tests of a competitive world market and asks if the Cotton Committee is now supplying cotton to Moscow more cheaply than the hundreds of private cotton factories and companies did in the old days, the answer must be in the negative Cleaned cotton now reaches Moscow at an average price of 18 roubles per pood (12 75d per lb) whereas before the war it fluctuated between 12 and 15, with an average of about

14 roubles. Cotton, therefore, costs Moscow factories somewhat more than 30 per cent higher than it cost before the war, in spite of the fact that the cotton-cleaning process has been immensely improved, mechanized and concentrated in 63 well located and well-equipped ginning mills instead of the former 197 smaller primitive ones.

Little then can be proved one way or the other about the economic desirability of State management from the very complicated reckonings of cotton in Central Asia. This may, however, be said. In the ruined condition in which Central Asian cotton growing was left in 1922, it could not have revived without extensive subsidies and very heavy capital outlay for irrigation, machinery, new seed and credits to hungry peasants. Nor could it have survived in its beginnings a single year of competition with the world market fluctuations. The chief means of subsistence of the peasantry of two Central Asiatic republics would have been wiped out without the protection given to it through governmental control both of its capitalization and of its markets. It was wiped out during the revolution and civil war and tens of thousands of peasants perished. The fact that all of Central Asia is now again reviving is due, more than to any other one fact, to the protected revival of its cotton growing.

The Administrative Council of the Empire Cotton Growing Corporation, with the approval of the Board of Trade, have decided to reduce the rate of the spinners' levy from 3d. to 1d. per 500-lb. bale. The reduction will be effective from July 18, 1930.



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American Cotton

Final Ginning Estimate for 1929-30.

The preliminary final ginning report of the Census Bureau was issued on March 20 last, and showed that the cotton ginned of the crop grown in 1929 was 14,545,000 running bales, against 14,297,000 bales in the previous year, and 12,783,000 bales two years ago. The total in equivalent 500 lb. bales was 14,821,000 bales, against 14,478,000 bales last season and 12,956,000 bales for the 1927 crop. The average weight of the bale is returned at 509.5 lbs., against 506.3 lbs. last year and 506.8 lbs. two years ago.

The above total includes 572,000 round bales, against 673,000 bales last year, and 29,000 bales of American-Egyptian, against 28,000 bales. The quantity remaining to be ginned after the March canvass is estimated at 33,000 bales, against 72,000 bales last year.

The following table gives details with comparisons:—

	1930	1929	1928
Alabama	1,308,000	1,096,624	1,173,430
Arizona	149,000	145,731	90,281
Arkansas	1,395,000	1,216,241	979,481
California	255,000	171,042	89,998
Florida	30,000	20,053	17,361
Georgia	1,339,000	1,053,205	1,111,399
Louisiana	798,000	685,868	543,153
Mississippi	1,875,000	1,462,021	1,346,489
Missouri	221,000	146,921	116,024
New Mexico	86,000	82,177	64,920
North Carolina	767,000	869,248	879,677
Oklahoma	1,125,000	1,187,042	1,009,626
South Carolina	833,000	744,390	738,550
Tennessee	504,000	423,471	355,975
Texas	3,803,000	4,941,545	4,229,367
Virginia	48,000	44,764	30,705
Other States	9,000	6,206	6,675
Total	14,545,000	14,296,549	12,783,112

GRADE, STAPLE, AND TENDERABILITY REPORT TO JANUARY 16th, 1930.

(*Issued by Bureau of Agricultural Economics*).

The following report refers to cotton ginned to January 16, 1930 (estimated from data obtained from the classification of samples representing American Upland and American-Egyptian Cotton; according to Official Cotton Standards of the United States):—

	1929-1930 Bales	1929-1930 Per cent.	1928-1929 Bales	1928-1929 Per cent.
Total crop (as reported by the Bureau of the Census)	14,187,300	100·0	13,889,000	100·0
Grades (American Upland) :				
White, middling and better ..	9,146,200	64·6	9,816,900	70·8
White, strict low and low middling	2,592,300	18·3	1,731,400	12·5
White, below low middling ..	281,500	2·0	251,300	1·8
Spotted and yellow tinged ..	1,624,400	11·5	1,574,100	11·3
Light yellow stained, yellow stained, grey, blue stained ..	44,200	0·3	22,500	0·2
Tenderability on Section 5 futures contracts (American Upland) :				
Total tenderable..	10,826,800	76·4	11,547,000	83·3
Tenderable ⅞ in. to 1 $\frac{1}{32}$ in. inc.	9,306,800	65·7	10,209,300	73·6
Tenderable over 1 $\frac{1}{32}$ in. ..	1,520,000	10·7	1,337,700	9·7
Total untenderable	3,335,000	23·6	2,316,600	16·7
Untenderable in grade ..	458,800	3·2	390,000	2·8
Untenderable in staple ..	2,628,400	18·6	1,768,300	12·8
Untenderable in both grade and staple	247,800	1·8	158,300	1·1

	1929–1930 Bales	1929–1930 Per cent.		1928–1929* Bales	1928–1929* Per cent.
Staple (American Upland) :					
Under ⅞ in...	2,876,200	20·3	⅞ in.	5,832,860	41·99
⅞ and $\frac{29}{32}$ in...	5,410,000	38·2	$\frac{15}{16}$ in.	3,179,316	22·89
$\frac{15}{16}$ and $\frac{31}{32}$ in.	2,671,700	18·9	1 and 1 $\frac{1}{32}$ in. ..	1,568,674	11·29
1 and 1 $\frac{1}{32}$ in.	1,649,300	11·6	1 $\frac{1}{16}$ and 1 $\frac{3}{32}$ in.	733,498	5·28
1 $\frac{1}{16}$ and 1 $\frac{3}{32}$ in.	885,600	6·3	1⅛ and 1 $\frac{5}{32}$ in.	439,589	3·16
1⅛ in. and longer	669,000	4·7	1 $\frac{3}{16}$ and 1 $\frac{7}{32}$ in.	157,637	1·14
$\frac{13}{16}$ in. and under	1,927,047	13·87	*¼ in. and over	27,810	0·20

* Although the 1928–29 figures were classed under separate headings they are comparable with those just issued, we therefore attach the figures issued last year to the present report.

The Washington Department of Agriculture reports by cable that the cotton crop ginned up to March 20 contained 3,521,000 bales of untenderable grades, as compared with 2,539,000 bales in the previous crop.

A Bill was recently introduced into the lower house of the South Carolina State Legislature by a former textile mill employee, which prohibits any weaver from operating more than 48 looms. It has been sent to the State Senate for further action.

The Bill is being strongly opposed by the manufacturers, who state that if it is enacted into law it will cripple the cotton mill industry in the State and will prevent other mills from coming there.

The American Cotton Co-operative Association.

Specially contributed by Allen Northington, President of the American Cotton Co-operative Association, Montgomery, Alabama.

The American Cotton Co-operative Association is the national organization of the Cotton Co-operatives, and is recognized and approved in form by the Federal Farm Board. Its authorized capital is \$30,000,000 and it is empowered under its articles of incorporation and by-laws, among other things, to act as a central selling agency for all of its stockholder co-operative marketing associations. All of the Cotton Co-operatives of the country with the exception of the Staple Cotton Co-operative Association, at Greenwood, Mississippi, make up its ownership and will be the beneficiaries of whatever success it may make.

For purposes of analysis the activities of the co-operation may be divided into three separate and distinct phases: —

First, it is the central organization of the Cotton Co-operatives and as such will be directly responsible for the actual marketing of all the cotton of its member associations. It is also the agency through which the Federal Farm Board extends its financial co-operation to the Cotton Co-operatives, and as such will loan its funds to the Co-operatives for the following undertakings: —

(1) To extend credit for marketing purposes—by which is meant the advancing of money through the State Associations to the growers at the time their cotton is delivered.

(2) To extend credit to the State Associations for financing physical facilities, such as the purchase of warehouses, compresses, gins, etc.

(3) To extend credit to the State Associations for financing membership campaigns; and

(4) To extend credit to the State Associations for subscriptions to the capital stock of production credit corporations. The corporation will not loan money to credit corporations for production credit purposes, as such money must come from either the Intermediate Credit or commercial banks.

The extent to which these powers will be actually exercised in carrying on such credit relations between the American Cotton Co-operative Association and the State Organizations will depend upon the need for such service and facilities, and the securities which the State Associations are able to give the central organization and the Federal Farm Board.

Furthermore, the activities of the central corporation will express themselves in vitalizing the Farm Board's policies with reference to matters of organization, education and co-operation among the cotton growers, bankers, business organizations and all other essentials to the greatest possible success of the movement as a whole. Such activities will include three important public relations:--

(1) The extension of membership in the State Organizations.

(2) The effort to synchronize production in line with the world's needs of American Cotton so far as quantity is concerned; and

(3) The improvement of the staple quality and character of the American cotton crop in order to preserve the supremacy of American cotton production and in order to obtain for the growers the highest possible price consistent with the quantity and quality of the cotton produced.

The second phase of the activities of the American Cotton Co-operative Association will be that of buying and selling cotton up to the volume contributed by all of the State Organizations combined, whenever, in the opinion of the Directors of the Corporation and the Federal Farm Board, the same may be done in the interest of correcting any abuse which may obtain in any part of the Cotton Belt, or when, in the opinion of the management, such operations will be conducive to the best interest of its membership.

In other words, the central corporation now has all the rights and privileges possessed by any private cotton merchant in the handling of its domestice or foreign business, or in the handling of spot or contract cotton. If it appears to be necessary to adjust a condition brought about by manipulation or by an unbalanced technical position in the market, the central corporation may either take or make deliveries in any of the markets in which such deliveries are made by the future exchanges. Whether it shall ever exercise this power, and, if so, to what extent, is likewise a matter of dealing with conditions as they arise.

The third important function of the American Cotton Co-operative Association is that of acting in co-operation with the Federal Farm Board as a stabilization corporation, as authorized by law.

The stabilization functions are intended to be invoked only in case of emergency and extraordinary conditions affecting supply and demand and price. Under this provision of the law the central corporation will take off the market, with the financial aid of the Federal Farm Board, whatever quantity of cotton may be necessary to stabilize the price at levels consistent with the co-operation which the Farm Board is obtaining from the growers themselves.

It is manifestly understandable that the Farm Board can not protect the price indefinitely, or even for a reasonably long period of time if growers persist in over-planting and over-producing. But, on the contrary, if on account of unusually favourable weather and crop conditions, an exceptionally large acreage yield is obtained, the Farm Board will doubtless be called upon to assist the growers under such circumstances to prevent a bountiful harvest from bankrupting them and their creditor friends. On the other hand, if an excessive crop is produced on an acreage completely beyond all reason of conservatism and it in turn produces an exceptionally large harvest, the Board has warned the farmers that

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under such conditions it will be impotent to overcome such economic conditions.

The Farm Board and the Cotton Co-operatives realize, as every sound thinking man must, that it is easier to control surplus before it is produced rather than afterwards, and they are, therefore, at this time appealing to the cotton growers and the business interests of the South to co-operate with them in reducing the acreage planted to cotton.

These two agencies combined are likewise appealing to the organized intelligence of the cotton growers and their business friends to assist in production of a quality of cotton commensurate with the practical possibilities of the various sections of the South in which cotton is grown. These agencies are earnestly appealing for an organized consciousness of the issues involved, realizing, as they do, that not only the value of the 1930 crop, but also succeeding crops and, in consequence, the prosperity of business in general are at issue.

The appeal to all business men of the town and country now is to stand together as one organized South in producing the quantity and quality of crop best suited to the world's needs and to merchandise it in such a way as to secure for it the highest obtainable price consistent with world business conditions and supplies of cotton.

DATES OF ISSUANCE—GOVERNMENT REPORTS.

(*Season of* 1930-1931.)

U.S. CROP REPORTING BOARD.

U.S.A. Eastern Standard Time.

Tuesday, May 20, 1930, 11 a.m., revision of the report on acreage and yield of cotton in 1929.

Tuesday, July 8, 1930, 11 a.m., report on the acreage of cotton in cultivation on July 1, 1930.

Friday, August 8, 1930, 11 a.m., reports as of August 1, on condition and probable total ginnings of cotton.

Monday, September 8, 1930, 11 a.m., reports as of September 1, on condition and probable total ginnings of cotton and an estimate of the acreage of cotton abondoned since July 1.

Wednesday, October 8, 1930, 11 a.m., reports as of October 1, on condition and probable total ginnings of cotton.

Saturday, November 8, 1930, 11 a.m., report as of November 1, on probable total ginnings of cotton.

Monday, December 8, 1930, 11 a.m., reports as of December 1, on preliminary estimates of probable total ginnings of cotton and estimate of acreage of cotton abandoned since July 1.

U.S. BUREAU OF THE CENSUS GINNING REPORTS.

Subject to revision.

Date of Publication	Estimated Ginnings to	Date of Publication	Estimated Ginnings to
Aug. 8	July 31	Nov. 8	Oct. 31
Aug. 23	Aug. 15	Nov. 21	Nov. 13
Sept. 8	Aug. 31	Dec. 8	Dec. 1
Sept. 23	Sept. 15	Dec. 20	Dec. 13
Oct. 8	Sept. 30	Jan. 23	Jan. 16
Oct. 25	Oct. 17	Mch. 20	Final figures

Cotton ginning reports issued on August 8, September 8, October 8, November 8 and December 8, are published at 11 a.m.; all others at 10 a.m. (U.S. Eastern Standard Time).

Reports on the monthly consumption and stocks on hand in U.S.A. are issued at 10 a.m. (U.S. Eastern Standard Time) on the 14th of the succeeding month.

U.S.A. Eastern Standard Time is five hours behind Greenwich mean time.

(For the convenience of our members a pocket reference card showing the above dates of issuance of U.S. Government Reports will be found elsewhere in this issue. Spare copies may be obtained on application to the offices of the International Cotton Federation, 238, *Royal Exchange, Manchester.)*

"ON CALL" SYSTEM OF SELLING.

In a recent letter to Arthur W. Palmer, of the Bureau of Agricultural Economics, Mr. Edward S. Butler, Vice-President of the New Orleans Cotton Exchange, stressed the dangers which have grown up in the practice of buying and selling cotton "on call," and urges co-operative action between the Bureau of Agricultural Economics, the American Cotton Shippers' Association, the various spot and futures exchanges and the cotton co-operatives to control the situation.

"The practice of transferring calls from one month in the future to another, and even from year to year, has grown up," Mr. Butler writes. "Also the option is given, in some cases, particularly in Japan by certain shippers, permitting the fixing and 'unfixing' of call cotton. The two are most uncommercial practices.

"The system of doing business on call has its benefits in so far as it has eliminated the market risk of offering cotton at fixed prices, but the abuses above referred to have so affected the trading in the futures market as to, in my opinion, adversely affect the price of cotton because all cotton is bought and sold basis futures. In short, it means that hedge selling under this system is concentrated, whereas hedge buying is scattered at the will of the buyer over the whole season and is often transferred into another season."

Several evils result from the abuses of the call system, Mr. Butler argues. One is that the merchant, in effect, lends the spinner the cotton for the time being, so that the spinner is really permitted to speculate without actually trading in futures and does so on the merchant's capital. Another is that the farmer, in selling on call, is speculating on cotton, but that he harms himself by this method because of forcing concentrated hedge sales on to the market, so that he would do better, if he wishes to speculate, to hold the actual cotton.

COST OF COTTON PRODUCTION IN TEXAS.

According to George B. Terrell, Commissioner of Agriculture for Texas, the average cost of producing cotton in that state this season was about 7 cents a pound higher than the price received by the farmer for that commodity.

In his report on the 91 counties under his supervision, Mr. Terrell states the average cost of production was 23.9 cents, while the average price received was only 18 cents.

Central Texas leads the list in districts where the production cost is highest, the average cost per pound being 30.8 cents. Northern Texas with 16.2 cents has the most favourable production costs with the other districts ranging between these two. Varying yields per acre are the cause of these differences in costs.

Senate Investigations of Cotton Trade.

In the January issue of the *International Cotton Bulletin*" we published much of the evidence taken before the Sub-Committee of the Senate Committee of Agriculture which was investigating the Cotton trade. This Committee has now made public their report and recommendations.

The recommendations of the Committee follow in full:—

(*a*) That the United States Cotton Futures Act be amended in the following particulars:—

1. To provide for the designation (by the Secretary of Agriculture) of cotton-futures exchanges as "contract markets," and the creation of a commission composed of the Secretary of Agriculture, the Secretary of Commerce, and the Attorney General with authority to suspend or revoke the designation of a contract market upon a sufficient showing; and that such amendment embrace also provisions.

2. That non-members of a cotton-futures exchange who file for execution orders for purchase or sale shall comply with the requirements applicable to members.

3. That the contract for future deliveries traded in on any exchange shall name as place of delivery a spot market or markets among the markets designated for the purpose by the Secretary of Agriculture, and that if provision is made for delivery at the point where a futures market is located, which such point is not

itself a normal spot-cotton market (as in the case of New York), such delivery shall be made at the same price as that applicable to the deliveries at the southern delivery points named in such contract.

4. That the board of directors or governing board of each designated cotton-futures exchange shall establish a control committee with powers of investigation for the purpose of preventing manipulation or the cornering of cotton; for the determination and announcement from time to time of the limitation of open interest in future contracts in any one month by any individual, firm, or corporation, subject to appeal to the Secretary of Agriculture.

5. That to facilitate deliveries at southern spot markets notice of intention to deliver be given on the tenth business day preceding the delivery day, in lieu of the fifth business day now required under the cotton futures act, and that such notice specify the date and place of delivery and the number of bales of each grade and the staple length of each bale.

6. That any cottons over $\frac{7}{8}$ in. in staple length shall be deliverable at their full staple premiums over $\frac{7}{8}$ in. as determined in general conformity with the provisions of the Cotton Futures Act with respect to commercial differences for grades above and below middling.

7. That the term "manipulation" as applied to cotton-futures trading be defined as specifically as possible with the information at hand.

8. That adequate authority be given to investigate any unfair practices or abuses upon cotton-futures exchanges, and to secure and publish information bearing upon the operations of such exchanges and the cotton markets in general, including the volume of future trading and the open interest by options. Under such authority the Department of Agriculture should make a study of sales on call and be prepared to furnish to Congress the facts as to the amount of selling on call, the extent to which it is followed, and the localities and groups among which it prevails.

9. That the penal section be made broad enough to apply specifically to various forms of abuses which the amended statute would be intended to correct, and provide for fine and imprisonment, either or both, for violations.

The Cotton Futures Act as it now stands is believed to be constructive legislation and your Committee thinks that its essential features should be preserved; however, it would seem desirable that any amendatory legislation be based upon the authority of Congress to regulate interstate commerce. Various bills, some of them in the form of proposed amendments to the Cotton Futures Act, are now pending in both the Senate and in the House of Representatives, which are intended to provide for further regulatory control of cotton futures trading. Your Committee believes that for the most part the above recommendations may be adequately covered by a suitable adaptation of language from

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some of these pending bills. Members of the Committee are now giving this matter their serious attention.

(*b*) The Committee would further recommend that the Secretary of Agriculture be authorized and directed to make a thoroughgoing study of the production of foreign cottons during recent years, the trends in production in various countries, the improvements, if any, in the quality, and the competitive influences of foreign growths; and it is recommended that funds be provided which will enable this important subject to be adequately dealt with, including actual surveys upon the ground in the more important countries now producing cotton.

(*c*) During the course of the hearings comment was made upon the criticism to which the American cotton bale has been subjected, particularly in the foreign countries, on account of its ragged appearance and the waste or damage to which the cotton is exposed because of the unsatisfactory way in which it has been covered. There was some discussion also as to the possibility of the use of bale-covering material manufactured from the lower grades of cotton and the desirability of the purchase and sale of cotton on net weights, in lieu of the present practice of selling on gross weights. The Committee recommends legislation to authorize the Department of Agriculture to standardize various bale-covering materials, including suitable materials manufactured from cotton, and after reasonable notice to require the use of standardized materials in interstate and foreign commerce. Such legislation might well incorporate provisions requiring the sale of cotton in interstate and foreign commerce on net weights after suitable standards are established.

Finally, the Committee believes that the cotton farmer should be encouraged to improve his yield per acre, where practical, by the use of better seed and more fertilizer, and that he should have facilities to insure competitive bidding for his crop, so that at no time would he be at the mercy of the buyer. The Federal Farm Board, now an adjunct of the Government, with ample power to deal with and through co-operative associations, has been organized to relieve the farmer's dilemma by furnishing him the credit to withstand the selling pressure which usually occurs at the height of the picking season and to carry his cotton so that it may not be forced upon the market at a loss through lack of money at a low rate of interest.

It would seem that the Federal Farm Board may ordinarily rely upon the world demand for the cotton crop of the United States; that the effort of the farmer, with the co-operation of the Federal Government, should be to decrease the cost of production by increasing the yield per acre where practical, and not to increase the number of acres; to improve the quality of the staple and the grade of his cotton by proper seed selection and by careful picking, ginning, and baling; and that he may rely to some extent upon the Federal Farm Board for the financial assistance necessary to protect the price by orderly marketing, and to break down combinations that may be formed to depress, artificially, the prices which the farmers receive.

Methods of the Federal Farm Board.

Messrs. Munds & Winslow publish the following trenchant article on the methods of the Federal Farm Board:—

In all the history of more than a century and a quarter of its larger activities, the cotton trade never has been confronted by a situation so confused and baffling as that which exists at present. The Federal Farm Board unquestionably has been faced by a difficult problem and an impossible task. It would be unfair to place the full responsibility for the chaos on its shoulders.

The cotton exchanges, partly from reasons of diplomacy and partly from a sense of sportmanship, have refrained from attack on Farm Board policies. Among firms associated with the cotton trade there have been exceptions to this attitude. We do not hesitate to admit that we have been among these exceptions. We have taken the broad ground that the public interest and spirit of public service rose above all considerations of diplomacy that might call for a policy of *laissez faire.* We have felt that the ultimate reaction of the Federal Farm Board programme, if it should reach the consummation of its expressed purpose, in the end would be shattering to an appalling extent and degree.

As stated above, we do not attach full or even major blame for the collapse in cotton prices to Farm Board policies. We do believe, however, that the situation has been needlessly aggravated by its activities in the following particulars : The entry of this Government body into the situation at a critical time substituted Government dicta for free judgment. Those who might have protected themselves, such, for example, as spinners long of cotton or contracts, were lulled into a false sense of security by threats against the " bears." Most speculative and many trade shorts covered on this pronunciamento, and a weak and confiding long interest was built up on the assumption that the market would be sustained by Farm Board buying. When prices sank below the levels at which it had been announced that Government support would be forthcoming, scepticism regarding the fundamental merits of cotton became intensified by distrust over the ability of the Farm Board to check the decline.

Personalities or individual acts do not enter into the question. It is purely a matter of the systematic defects of an effort to influence prices by artificial methods. The fundamental evils may be partially outlined as follows :-

First, absence of knowledge regarding Farm Board plans and purposes. Here is a picture of the confusion. It is accepted that the aim is to advance prices. When? How? An aggressive campaign for acreage reduction has been undertaken. The most effective agent is a low price and the threat of its continuance. Is the Farm Board in sympathy with a price decline at this time in order to force an acreage reduction? How can the Farm Board bring about an acreage reduction without aiding in a price decline? How can it aid in putting prices up now when an advance might nullify its efforts to obtain an acreage reduction?

Second, as a result of this confusion, the exercise of independent judgment is entirely out of the question. No one dares to sell for fear Farm Board buying may put prices up. Those who feel that cotton under intrinsic conditions is cheap are afraid to buy for fear that the Board may want to get prices down in order to obtain its acreage curtailment. Year after year, season after season, the despised speculator would have undertaken a contract to advance prices on the assurance of acreage reduction. Yet, if speculation had embarked on an avowed programme to force this reduction through the medium of price depression, there is not a cotton exchange in the country that would not have been ordered closed within 24 hours.

Third, the selection of the co-operative marketing associations as an instrument in its plans has created confusion and unsettlement. Carried to its full consummation, it means the elimination of experienced and efficient merchandising organizations throughout the cotton and grain trades, the passing of warehouses and grain elevators into other hands by a process nothing short of confiscation. Judging from certain statements that have appeared in the press credited to Farm Board officials, the salvation, or salvage, of the co-operative associations is the major object in these undertakings, and independent producers, the great body of merchants, and all other interests do not come in for the slightest consideration. If one might be pardoned for attempting to tear aside the veil of mystery that now shrouds this astounding operation, every interest will be sacrificed if by so doing the co-operative associations can be welded into a compact selling cartel that will control the marketing of our great agricultural commodities. Time will tell whether this achievement will be worth the loss resulting from the revamping of our economic structure.

Fourth, the effect on our textile industry has been destructive. The improving tendency resulting from curtailment efforts has been checked. Losses on scale down purchases have been oppressive. Manufacturers first bought cotton on the expectation of Farm Board support. Later, they bought it because they regarded it as reasonably cheap. When prices crashed, mill executives were afraid to trust their own judgment.

Fifth, the collapse in commodity prices has cast doubt on the validity of hopes for business recovery. Public confidence, built up on expectations that the ambitious stabilization plans would prove effective, has been shaken by the aggravated decline in commodities which has been general and world-wide.

Sixth, it is impossible to escape the conclusion that the evil repercussions from the Farm Board undertaking will prove a continued source of international irritations and militate against good-will in our trade abroad. Taken in conjunction with efforts to raise our tariff walls still further to keep out foreign imports, the artificial effort to raise the price of our products will tend still further to foment hostility toward American raw materials and manufactured products.

In a letter which we issued January 30, we outlined the part played by speculation in the marketing of our great staple commodities. We take this occasion once more to enumerate briefly some of these functions. First, to provide a broad market, able and ready at all times to take or offer a commodity at a given price. Second, to furnish price insurance against declines or provide protection against future needs. Third, to limit the extremes of violent tidal fluctuations. Fourth, to discount future or impending developments, thereby exercising the acknowledged prophetic function of speculation which represents one of its most valuable services.

Contrary to the contention of producers, speculation does not put prices down. Contrary to the claims of manufacturers, speculation does not put prices up. The influence of speculation on prices is twofold. It limits the extremes, preventing prices from going as high or as low as they would without it. Also, through its continuous influence on prices, it is reponsible for more numerous gradations in fluctuations through bringing about these intermediate fluctuations. Professor H. C. Emery, author of "Speculation on the Stock and Produce Exchanges of the United States," on this point says: "It needs little more than a mere statement to show the advantage of a speculative system in this matter. There are always some shorts ready to buy in as prices fall, and some 'bulls' ready to sell out as prices first rise, and these forces are very effective in graduating prices."

There have been frequent references to the declines in 1920 and 1926. Speculation either is blamed for having exaggerated these declines, or with having failed to stop them. The slump in 1920 was due to a world-wide collapse in prices due to a variety of conditions, including exhaustion of credit. The break of 1926 was due to the fact that the world was confronted with a crop four million bales in excess of the previous season's consumption. In both cases it may be emphatically and confidently stated, prices would have gone lower than they did if speculation had not aided in checking the decline.

Nothing is said by these critics about the advance of approximately 100 per cent. from the low level of December, 1926. We doubt if even the most devoted champion of the Farm Board programme will contend that

Government operations would have brought about any such rise as resulted from the wave of speculative "bull" enthusiasm during the spring and summer of 1927. It would be impossible for any federal bureau to organize and co-ordinate a campaign of such magnitude, which had behind it the resources and the trained market intelligence of hundreds of brokerage firms and tens of thousands of market operators.

As a matter of fact, we believe that Farm Board policies, as a result of essential defects, instead of advancing the prices of agricultural products, are more likely to *put them down.* Assume a drastic acreage reduction. Assume a September crop outlook of 13,500,000 bales. Assume a current price of 18 cents at that time, with the rank and file of speculators confident of an advance to 21 cents or even higher. Speculation always halts when something is hanging over the market, a bureau report, an important ginning report, an acreage report. Certainly it will wait until the Farm Board announces the amount it will loan on cotton.

Paragraph 5 of Section 7 (a) of the Farm Board Act runs as follows: "Enabling the co-operative association applying for the loan to advance its members a *greater share* (italics ours) of the market price of the commodity delivered to the association than is practical under other credit facilities." Note that the statute authorizes a "greater *share*" of the market price and, therefore, inferentially, a figure *less* than the market price which for the purpose of argument we have placed at 18 cents. What price will the Farm Board name? Let us assume that the loan value is placed at 16½ cents. For all practical purposes this, by the very workings of mass market psychology, will be the price of cotton instead of the 21 cents that represented the goal of the credulous speculator.

Before long, 16½ cents will become a "peg" price, the target of occasional market attack and the objects of distrust. Bear in mind that 16½ cents is the price offered to co-operative affiliates and not to independent producers. Unless some extraordinary development intervenes, the pressure of outside cotton, which is deprived of the fostering aid of the 16½-cent loan price, will shake the market edifice.

Efforts thus far to benefit the agricultural producers through methods of price control or resort to a super-marketing system, constitute a long record of failure. Time and again it has been shown that prices cannot be lifted through the agency of a legislative bootstrap. The law of supply and demand is more potent than any statutory enactment.

We believe that business history finally will set down the Farm Board programme as an economic nature fake. It will consign it to the museum of exploded myths, along with the Philosopher's Stone, perpetual motion, the Keeley motor, and the wild man of Borneo. If agriculture's plight is as serious as is claimed, it would be far better to give a bounty of 10 cents or so a bushel on wheat and 10 dollars per bale on cotton to producers. Although such a gratuity might cause the rest of the world to assume that the United States Treasury had been transformed into an eleemosynary institution, it would be less expensive than the Farm Board programme. It also would leave us with a free market, and it would remove the implication of economic imbecility.

We do not believe that the problems of the farmer can be solved through the agency of a marketing programme alone. Nor do we believe that drastic acreage reduction and control of output can afford more than temporary relief. The production of cotton throughout the world has become increasingly competitive in recent years. The proportion of the contribution of the United States to the total cotton supply has shown an unmistakable tendency to dwindle. Even if American producers held loyally together and reduced their acreage, the general knowledge of this movement, combined with the temptation of higher prices, would act as a stimulant to cotton production abroad. Equally as injurious, we point out, is the inclination to use "outside growths" whenever their substitution is possible.

If governmental support to prices, changes in marketing methods, and acreage reduction—some of these quite desirable in themselves—are rejected as solutions of the farm problem, what answer can be found to this vexed question?

We believe the impartial student will reply that it lies along the line of reduced reduction costs. In wheat-growing this has been accomplished

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largely through the employment of improved farm machinery. When it comes to cotton, while on large tracts the tractor will be helpful in reducing costs, the rounded mechanical solution of the problem has not yet been accomplished. While mechanics might cut the cost of certain operations to-day, it cannot do as much toward reducing production costs as can be brought about through the medium of increased production per acre along with an improved quality of cotton.

The position of almost every great industry is fully as competitive as that of agriculture, but industrial problems have been met with a frank recognition of the necessity of obtaining a working margin largely through lower costs. In cotton growing this can be accomplished only through intensive cultural methods. The yield per acre for the cotton belt as a whole in recent years has shown an average ranging from 124.5 lbs. in 1921-22 to 182.6 lbs. in 1926-27. The average farm price of cotton has ranged from 10.9 cents per lb. in 1926-27 to 31 cents in 1923-24. The farm value of the crop of 1926-27, amounting to 17,977,000 bales, was placed at $982,736,000, while the production in 1923-24, amounting to only 10,140,000 bales, had a reported farm value of $1,563,347,000.

No one will dispute the monstrous economic injustice of these figures. Viewed from one angle, they represent the punishment inflicted on the producer for giving the world an abundance of one of its most valuable raw materials. Others may see in it the penalty inflicted for the transgression of the law of supply and demand. The economic benefits resulting from the price of 31 cents were more apparent than real, as a large majority of farmers suffered a loss on account of the failure of their crops.

We are confident that a sound solution of the problem of the Southern cotton grower can be reached, but we believe such a result can be achieved only over a period of years and as a result of a broad and enlightened spirit. The goal toward which efforts should be directed is the production of cotton at a cost substantially below that of the growers of any other country and obtaining a profitable margin through the medium of such methods. That this means readjustment, probable elimination of inefficient producers, and the overcoming of many prejudices and traditions, goes without saying. Farmers will have to live largely at home instead of obtaining most of their family provender from the supply store. It means a regime of kitchen gardens, chicken yards and hog pens. Such a method would encounter opposition from large planters who want their renters to devote their entire attention to cotton, and inasmuch as the supply store means a revenue from the tenant, they have a deep animosity toward competition from gardens and home-slaughtered hogs. Moreover, it should be kept in mind that no solution of the farm problem can be reached that includes a profit for the inefficient high cost producer who really represents only a minor percentage of the whole.

We are firmly of the opinion that with intensive cultural methods a crop of 15,000,000 to 18,000,000 bales can be produced on an area of 30,000,000 to 32,000,000 acres. The farmer will benefit in several ways. His production costs will drop amazingly, thus giving him a larger margin of profit. He also will gain through the better quality of a product developed along intensive lines. Best of all, he will be able to obtain a profit at a price which could not be met on a living basis by " outside growths."

We concede that the absence of economic miracle in this suggestion makes it decidedly unappealing. It looks as if it were complacently sentencing the farmer to hard labour. However, if eight bales of cotton can be grown on 10 acres at a cost of 10 cents per lb. the farmer will have a decided advantage over a method that produces five or six bales of cotton on 20 acres at a cost of 16 cents or more per lb.

We do not doubt that many will ridicule this suggestion as the fantastic proposal of a New York farmer, tainted by the noxious fallacies that permeate the lair of the Money Devil. That the operation is feasible and that it is being carried on in a majority of the cotton-growing States, we call attention to the work sponsored by Colonel Harvie Jordan, with headquarters in the Chamber of Commerce Building, Atlanta, Georgia. About 20 years ago, the name of Colonel Jordan was anathema to most cotton merchants and practically every cotton manufacturer in the country. The writer clearly remembers the time when the Colonel was cavorting about the country, participating in acreage reduction campaigns and efforts to fix a " minimum price " for cotton.

For several years past Colonel Jordan has devoted himself to "The Better Farming Campaign" under the name of the old American Cotton Association. These operations have been conducted on 856 farms scattered throughout nine States. The work is purely educational and not stimulated by prizes for yield per acre. The letters and results printed in the Year Book of the movement are inspiring. The minimum production of lint cotton per acre in 1928 was 400 lbs., and the maximum was over 1,100 lbs., with an average of 600 lbs. The average cost was eight cents per lb., running as low as five cents. Net profits have exceeded $100 per acre.

Colonel Jordan has been dependent for the financing of these operations on private subscriptions. He deserves the cordial support not only of public-spirited citizens, but of the Government itself.

The development of cultural methods along such lines will furnish a remunerative margin for the American producers, and at the same time prove too low for foreign competition, providing an abundance of raw material of superior quality for the consuming manufacturer, and restoring prosperity to the cotton farmer's only customer, the textile industry.

We believe the American cotton grower has energy and intelligence enough to do this if the vote-seeking politicians will stop trying to pamper him by their crack-brained proposals. Those who really would like to know what can be done in cotton culture, even without the use of a lb. of commercial fertilizer, but by the pursuit of intensive methods, would do well to read *Farmers' Bulletin* No. 519, published by the United States Department of Agriculture. Sam McCall, a negro nearly 70 years old, produced as high as seven bales of cotton per acre, and once grew a bale of 506 lbs. on a measured one-eighth of an acre.

Enough American cotton to supply the needs of the world on 30,000,000 acres! A living, and frequently a handsome profit on these operations! A competitive level that once more will give control of the cotton markets of the world to the Southern producer!

What becomes of the cotton land—a difference between 30,000,000 and 47,000,000 acres? Some of it will be required for feed crops. A vast amount of the remainder can be reforested. This would be an investment worth billions of dollars to the United States, already feeling the loss of its magnificent timber supplies. If Congress desires to make a constructive appropriation, let it provide for the establishment of nurseries to supply farmers with stock at no cost for the reforesting of their lands. Every acre of this reforested territory should be exempt from local, State, or municipal taxation. There will be no immediate economic loss, as even larger crops can be grown on the cultivated portions. These reforested tracts would be worth more in the years to come than all the crops grown on them under present shiftless methods.

Many have asked that judgment on the Farm Board and its efforts be withheld until this "new" scheme be given a fair trial. There is nothing new about it except its name. Brazil gave it a new name, and called it "valorization." A crushing national debt is the memento of the occasion for trying to christen an economic fraud with an honest name.

More cotton on fewer acres, with costs cut from 40 to 60 per cent! That is something *new*, but it is real, and it is worth trying. We believe if the Southern grower tries it, gives it a sincere and energetic trial, he will be able to get along without some of his friends in Congress.

CROP NEWS.

One of our Memphis friends wrote us recently as follows:—

"Knowing that you are interested in the new crop possibilities, so wish to advise you that the general feeling on this market is that we cannot expect any reduction in acreage in the Central belt. We had a good crop this past season and it brought a good price due to the fact that it was so early. The farmers sold as fast as the cotton was picked and ginned and as a consequence are in good shape. While present prices should discourage them, we still think that they will go ahead and plant all they can handle.

"Conservative friends in Texas advise us this week that East and North Texas may reduce slightly but that the South and Western parts of the State will increase their acreage.

"The only thing that we can see that is likely to change the situation is a long continuous spell of cold rainy weather. This might prevent the farmers from putting in all they intend."

Messrs. Weil Brothers, of Montgomery, Ala., in their semimonthly crop letter, report under date April 1, 1930, as follows:—

On April first of each season every forecast that can be advanced for the new crop that is about to be pitched, or planted, is indefinite. Forecasts at this stage are nothing more than conjectures. Conditions affecting the planting and probable acreage of this crop are so varied that forecasts are to some extent nothing more than presumptions.

Land preparations over the entire belt are normal and well up to date. In part of the Western belt, where planting is usually very early, we have already complaints of the weather being too dry and in some instances too wet for planting. Sô, there, we have already a delay. In the extreme southern portions of the Eastern States planting is just beginning and the weather, on the whole, is favourable for it. In some of the low lands and river bottoms of the belt very little work has been done, owing to the fact that the moisture in these lands prevents it.

The acreage proposition at this stage is merely guesswork. The propaganda of influential sources such as banks, advancing merchants, who furnish supplies, and Farm Co-operative Bureaus, are all urging a reduction of 10 per cent. in acreage. Meetings after meetings have been called over the entire South by them. They forecast freely that, if acreage is not reduced, cotton may decline to as low a price as 12 cents per pound next fall, and that if the prospective crop would only be about fourteen million bales the crop would bring 20 cents per pound. They urge planting foodstuffs and other needful crops in order for the farmers to make themselves self-sustaining without buying anything. The theory is an excellent one. If carried to execution it will certainly redound to the financial independence of the farmers.

Another item of interest is the widespread propaganda to plant healthier and better seeds and thus try to produce a better staple crop of cotton.

In the contract market an advance of 2 cents per pound in the old crop months and about 1.65 cents or 1.70 cents in the new crop has taken place, and more confidence in the price of cotton is restored. The demand for spot cotton is very slow. The mills have not yet got used to the higher price, and though, on the whole, the textile trade of the world shows some improvement, the mills are showing considerable conservatism in buying cotton, except where they can sell their goods. By some it is judged that a premium of summer months above the fall months is not a very healthy condition.

Yield per Acre *v.* Acreage.

The following instructive article was prepared by Z. R. Pettet, of the American Cotton Crop Service, Atlanta.

Analysis of past production shows clearly that variation in the yield per acre is much more important than acreage change. For example, the difference between the average yield of 155.5 lbs. and the high yield of recent years (182.6 lbs. in 1926) is 27 pounds or about 17 per cent. above the average, and the low of 124 lbs. in 1921 is about 31 lbs. or 20 per cent. below. Of the greatest acreage changes, that of 1914 to 1915 was only 15 per cent. and that of 1921 was about 15 per cent.

Converting the illustration to bales and applying maximum variations in both directions to the coming season (the acreage base being last season's acreage and the yield per acre base the 10-year average), the following hypothetical production would occur:—

Yield Variation:

17 per cent. increase would produce 17,400,000 bales.
20 per cent. decrease would produce 11,900,000 bales.

Acreage Changes:

15 per cent. increase would produce 17,100,000 bales.
15 per cent. decrease would produce 12,800,000 bales.

YIELD PER ACRE PROSPECT BETTER THAN AVERAGE.

Because of expected destruction of weevils in upper belt and control in the western two-thirds of the belt on account of exceptionally severe freezes together with favourable moisture and other conditions, at this distance, the prospect is for a yield per acre above average. A map will be prepared when the winter is over showing expected local control because of the destructive effect of minimum temperatures. In this issue we wish to present, in graphic form, the weevil cycle indications. These cycles, we believe, are principally dependent upon temperatures low enough to kill hibernating weevils, following and resulting from weather cycles.

Without going into the theory of weather cycles or their duration, etc., we may say that there is much evidence to support the theory. As to the weevil cycle theory, most crop forecasters think "there is something in it." The graph (reproduced) is based on weevil damage estimates of the Government Crop Reporters worked into percentage lost from full or technical normal (100 per cent.) yield per unit. *Note carefully that the low weevil damage figures, therefore, appear toward the top of the graph* and the heavy damage percentages at the bottom. Note also the close correspondence of the lines of light damage and high yields, for example, in 1911 little damage with a 207.7 lb. per acre yield,

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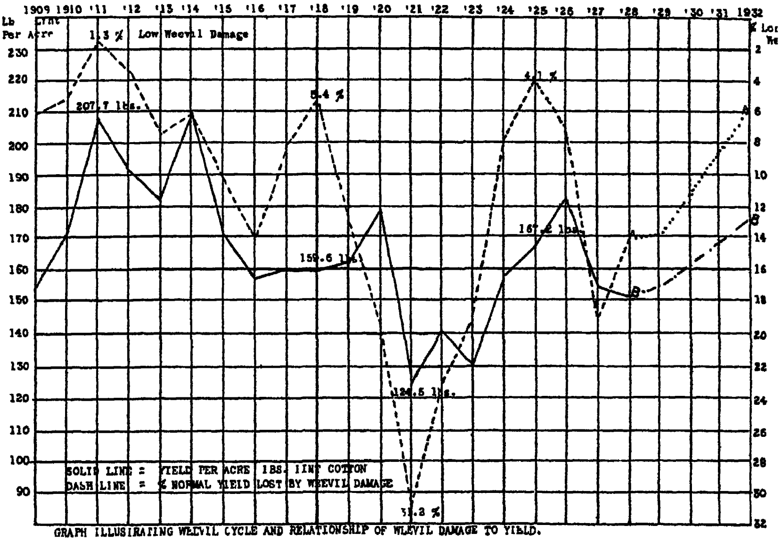
and the 1921 heavy damage, 31.2 per cent. with record low yield, 124.5 lbs. per acre.

Further note the seven-year intervals between years of least damage following years of severe freezes (1911, 1918, 1925).

WEEVIL DAMAGE BELOW 11 PER CENT. COMING SEASON, ACCORDING TO CYCLE INDICATIONS.

Bearing in mind that this is merely a rough working hypothesis with chance of wide variation any coming year, depending upon summer weather and unknown factors, these data point to a yield of something better than 161 lbs. per acre (about five lbs. over average) and weevil damage probably below 11 per cent. Last year's damage was probably in the range of 14 per cent. to 18 per cent. To be safe, we have represented the conservative end of the range rather than the centre point. The lines A A and B B represent conservative interpretation of future weevil damage and yields, based upon past records and the seven-year weevil cycle. They well deserve attention, but we again emphasize the fact that they represent our interpretation of operation of a theory and are not our forecast of future years.



GRAPH ILLUSTRATING WEEVIL CYCLE AND RELATIONSHIP OF WEEVIL DAMAGE TO YIELD.

An eminent American doctor asserts that chemists have produced a cotton-seed meat suitable for human consumption. He states that some day this "meat" will replace animal meat on the household menu! Some of the "meat" exhibited was served in sandwiches to those present, and the general opinion was that they were most delectable.

MECHANICAL COTTON PICKING.

Frequent reference has been made in this journal to mechanical cotton pickers; still another cotton-picking machine has been placed on the market in the United States.

The General Cotton Picker Co., of Fort Worth, announce the production of a horse-drawn and a power cotton-picker.

As the machine passes over the cotton row a system of endless chain feeders takes the cotton stalks into the machine, holding them in an upright position as they approach the vertical gangs of revolving picker fingers through which the plants must pass in a slightly compressed condition, the picker fingers operating in and out of the stalks, at the same time having a high rotary motion snatching the cotton from the open bolls. As the fingers or spindles return they shed the cotton. It then drops in a vacuum pan, is elevated by the fan and discharged into the receptacle located on the rear of the machine, thus handling it the same as at the gins, the air current drying any light moisture on the cotton.

The makers claim that cotton picked by this cotton-picker under ordinary conditions is cleaner than hand-picked and frequently its value increased a cent per pound.

LONG-STAPLE TARIFF.

By a vote of 49 to 32 the Senate, March 3, adopted an amendment to the tariff bill to impose a duty of 7 cents a pound on long-staple cotton, that with a staple of 1⅛ ins. or more. A similar duty was carried in the emergency tariff act of 1921, continuing until the present tariff was enacted in 1922.

To compensate manufacturers using long-staple cotton for increased cost due to the tariff of 7 cents per pound, as stated above, the Senate approved a duty of 10 cents a pound on all products made from cotton of a staple of 1⅛ ins. and over. The cotton textile rate went through without a word of debate. A proposal of Senator Heflin (Dem.), Ala., for a duty of 4 cents a pound on short-staple cotton was rejected. The 10 cents a pound duty on products made from long-staple cotton, would, it says, be in addition to the duty provided in the bill on such products.

The Biology of the Cotton Boll-Weevil.

A recently published bulletin by Messrs. F. A. Fenton and E. W. Dunham, of the U.S. Bureau of Entomology, entitled "Biology of the Cotton Boll-Weevil," at Florence, S.C. (Technical Bulletin No 112), contains some interesting facts on the life of the boll-weevil. The authors state that climate exerts a very important influence upon the seasonal cycle of the cotton boll-weevil at

Florence, S.C. Unusually low temperatures, such as 11°F. or lower, appear to be unfavourable for the over-wintering weevils. Hot, dry summers, as experienced in 1925 and 1926, are also unfavourable. The frequency of rains, as well as the total rainfall, has an important bearing on boll-weevil development.

After being punctured once, a square remained on the plant, on an average, 7.35 days. When given their preference, weevils never punctured squares less than six days old of egg deposition. The younger a boll was, the greater was the average number of feeding punctures made by weevils in a 24-hour period.

In two varieties of short-staple and one of long-staple upland cotton, more egg punctures per boll were made in bolls from six to 20 days old than in those one to five days old, but after 20 days the number per boll dropped steadily. For these same varieties the average cotton loss in terms of locks damaged or destroyed was highest in bolls one to five days old, and it dropped rapidly for all three varieties until the bolls opened.

WEEVIL REPORTS STOPPED.

The issuance of boll-weevil hibernation reports by the Department of Agriculture has been discontinued. These reports, as issued in the past, dealt with the number of boll-weevils entering hibernation in the fall, the mortality of weevils in winter as determined by moss examinations, and the emergence during spring of weevils in hibernation cages.

This decision has been reached because an estimate of boll-weevil damage based solely on these hibernation data is likely to be misleading, the announcement stated, in view of the fact that weather conditions during the growing season may change entirely the status of the weevil as a factor affecting the crop. Furthermore, available data are insufficient.

FERTILIZER SALES.

State details of Secretary Hester's report on sales of fertilizer tags in nine cotton States, during the seven months of the season ending with February, follow:—

	1929-30	1928-29	1927-28
Georgia	342,265	225,789	351,527
North Carolina	336,769	321,082	438,725
South Carolina	191,749	188,836	330,538
Alabama	180,200	133,900	238,350
Mississippi	179,934	110,951	147,746
Arkansas	53,976	47,950	16,691
Louisiana	101,833	86,694	84,262
Tennessee	41,124	36,402	56,309
Oklahoma	6,200	5,265	7,223
Total	1,434,050	1,156,869	1,671,271

Sales of fertilizer tags in the thirteen Southern States for the month of February amounted to 1,076,275 short tons, compared with 819,895 in February last year and 1,117,807 in February two years ago. For the period December-February 1929-30, sales amounted to 1,686,242 short tons, compared with 1,385,211 for the same period in 1928-29 and 1,903,459 in 1927-28. The sales for February this year were 31.3 per cent. larger than for February, 1929, but 3.7 per cent smaller than for February, 1928.

Unsatisfactory Experience with Irrigated Cotton from U.S.A.

The following letter has been received from a large cotton spinning mill in Switzerland, which wishes it to be brought to the notice of other members:—

"Last year we bought from a large cotton exporter in Galveston, Texas, 100 bales of Texas cotton strict middling 1 1/16. The samples which we had ordered to be drawn at Bremen showed up well in character and staple, but we were very much surprised to find at the mill that the yarn spun from this cotton was full of neps and the cloth produced had a very rough appearance.

Our first concern was to see that the different machines were set right, and this proved to be so. Then we made tests by the help of the microscope and saw that the neps consisted of rolled-up fibres. Chemical tests showed that this cotton had only half the percentage of wax compared with the real Texas cotton of good spinning quality. We made this test because we knew that bleached cotton, for instance, put through the machines in the ordinary way occasioned similar difficulties in spinning.

This small percentage of wax and the exceptionally good staple (it was distinctly better than 1 1/16) made us think that the cotton had originally come from irrigated land and was not cotton from Texas, such as we had contracted for.

Our customers rejected the cloth, and we not only suffered a loss of $1,600, but our reputation suffered through this unsatisfactory delivery.

We wrote to the shipper explaining the unsatisfactory experience which we had made with his cotton, and he then answered as follows:—

> Examining the 100 bales we found the interesting fact that 53 bales came from territory round El Paso, in New Mexico, the other bales from Arkansas, Mississippi and Texas.
>
> The fact that this cotton came from such a variety of places, grown on such a variety of soil, makes invalid any claim on us for defective spinning, due to the peculiar character of these 100 bales.
>
> This cotton was shipped from our regular Texas stock. This means that when the cotton came in from New Mexico it was found to be exactly the same character, smoothness and

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strength as the cotton from the Delta or from Arkansas, and therefore was put in with this stock It is our opinion that if our classer found this cotton to be of this nature, no classer would pick these bales out of irrigated cotton, not even our own staff, after the bales have once lost their identity

Although our Galveston shipper admitted that he had not shipped cotton as per contract, one must assume that he knew the composition of the 100 bales shipped

The only allowance which the Galveston shipper offers is 50 points, which we have not accepted, as we consider it insufficient in view of the loss of $1,600 which we have suffered, besides injuring our well-known reputation for first-class deliveries

We have lost, of course, our confidence in the Galveston shipper, any spinner desiring to know the name of this Swiss spinner who had this experience, can obtain particulars by applying to the Head Office of the International Cotton Federation, 238, Royal Exchange, Manchester"

What Price Cotton?

Mr W L Clayton, of the well-known Houston firm of cotton exporters, Anderson, Clayton & Co , has recently prepared a pamphlet with the above title, in which he states his views on the inability of the American cotton farmer to produce cotton at a world economic price

Any article on cotton from the pen of Mr Clayton is well worth the study of cotton men We regret not being able to reprint his pamphlet in full, but would remind those who are interested in reading the complete report that Messrs Anderson, Clayton & Co , Houston, Texas, will be pleased to forward copies to those who make application for the same

We extract the following from Mr Clayton's pamphlet —

"The special session of Congress called by the President to deal with the farm situation enacted 'The Federal Farm Act,' creating the Federal Farm Board, and appropriating $500,000,000 to be used by the Board in promoting co-operative marketing of farm products, and in the stabilization of the prices of such products

I have from the beginning favoured the organization of cotton co-operatives There is every reason why cotton farmers should organize and co-operate in the solution of their common problems Every major industry in America to-day is so organized

The present system of cotton production, dominated, as it is, by an archaic credit system, is certainly the most inefficient of all our major industries The past twenty years discloses a shocking record of lowered yields and quality Not all the blame for this can be placed on the farmer. The boll-weevil is responsible for much of it

No adequate attempt has been made to relate production to probable demand

The Federal Farm Board, working through the cotton co-operatives, can bring salutary influences to bear on this situation

It can focus the producer's attention on his real problems. It can guide and assist the producer groups in coping with these problems.

These influences should bring in the next 10 years marked improvement in production methods, in the adoption of a more economical credit system, and in the regulation of supply of cotton to fit demand.

'Stabilization' may be justified in extreme circumstances, but as a price-defending weapon, it is, as every informed person knows, loaded with dynamite and should be labelled 'Handle with Care.'

But the Federal Farm Act is not, and cannot be, a serious, sincere effort to come to grips with the real fundamental problem so far as the cotton farmer is concerned.

The real problem is that of competition between our producers working in a tariff-protected country, and the cheapest labour in the world, that of India, China and Africa.

Fifty-five per cent. of the cotton raised in the United States is exported to foreign countries.

The present consumption of cotton outside the United States is about 20,000,000 bales yearly, of which the United States furnishes only 8,000,000, or about 40 per cent. Twenty years ago the United States furnished 53 per cent. of the consumption of cotton outside the United States, and 50 years ago we furnished three-fourths of the cotton consumed outside the United States.

Cotton has ceased to an American commodity. It is a world commodity, the price of which is determined by competitive growing costs of the entire world and by what the entire world can pay as consumers.

The price of American cotton cannot be protected by tariffs as long as our cotton crop is an export crop. All that the tariff system does or can do for the cotton farmer is this: it raises the price of what he buys and reduces the amount of dollar exchange that is available to consumers abroad for the purchase of his cotton.

The United States, in one way or another, have loaned to Europe, in the past 10 years, sufficient funds to pay for Europe's excess of imports over their exports to us. We cannot indefinitely continue this course. As prudent bankers, we will doubtless soon wish to collect interest on these loans. As the obligations mature, we may want some of the principal repaid. What, now, will be the effect of this logical development upon European purchases of our commodities, like cotton, in the face of our national policy of raising higher and higher the tariff barriers against the importation of European manufactures?

The American Farm Bureau Federation recently made a survey to ascertain, if possible, the total effect of a protective tariff on the income and expenditures of the farmers of the country.

The statistical calculations made lead to the conclusion that the net loss to agriculture from the tariff was $300,000,000 a year.

James E. Boyle, Professor of Rural Economy, of Cornell University, has also made a careful study of the subject and estimates the amount to be five times this sum, or $1,500,000,000."

Professor Boyle then gives a résumé of all the articles which are practically necessities to the farmer, but at the same time are on the tariff list. The dutiable list covers items for the whole family,

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"The extra session of Congress, called to enact measures of farm relief, voted a $500,000,000 appropriation for relief of the farmer They then proceeded, at least so far as the cotton farmer is concerned, to attempt to take from him in new duties on manufactures and on those agricultural commodities of which the cotton farmer is a consumer far more than he can ever expect to get from the 'farm relief' appropriation.

If the price of maintaining the present position of this country in the world cotton trade is to be a sub-marginal standard of living for the cotton grower, then the price is too high, and it becomes our duty to point out the true situation to the cotton producer and to urge the only course which appears open to him, and that is substantially to reduce his cotton acreage and devote more of his time and attention to producing for himself those necessities of life which a political and economic mal-adjustment prevents him from acquiring through the normal process of exchange of his labour employed in the production of cotton

This course will undoubtedly cause the abandonment to foreign countries of a further portion of the world's cotton trade. In time, the Southern States may produce only sufficient cotton to supply domestic requirements; if so it will be the inevitable consequence of a national policy of industrial protection which leaves no place for agricultural workers for the export trade."

Supplemental to his report Mr. W. L. Clayton gives his own evidence before the Sub-Committee of Senate Investigating Cotton Prices last December In his evidence the author points out that, "according to Secretary Hester, the average market price of Middling ⅞ in cotton for the 10 years immediately preceding the World War was 11 60 cents

For the same 10 years the average yield per acre, according to the U.S Department of Agriculture, was 193 pounds. For the 10 years succeeding the war the average yield per acre has been 156 pounds.

The per-acre cost of producing cotton is almost unaffected by fluctuations in yield It costs as much to produce 156 pounds of cotton on one acre as it does to produce 193 pounds on one acre. The gathering of 156 pounds is a little less costly than the gathering of 193 pounds. But the 156-pound yield was due mainly to boll-weevil depredations and soil depletion Poison and the labour of its application added to the cost of production More fertilizers had to be used One hundred and ninety-three pounds of cotton at 11.60 cents per pound gives a gross return of $22 39 per acre. A gross return of $22 39 per acre, with a yield of 156 pounds, is equal to 14.35 cents per pound; 14.35 cents per pound would therefore be the equivalent of pre-war prices if costs of labour, farm machinery, taxes and all other things entering into farm life were the same as before the war, but $1.00 to-day has the purchasing power of only 65 cents at pre-war prices. Hence 14.35 cents per pound pre-war become 22 08 cents when converted into the purchasing power of money to-day. Therefore the cotton farmer, based on his post-war yields per acre, on the average market price of cotton for 10 years prior to the war, and on the present purchasing power of the dollar, must obtain 22.08 cents per pound for his cotton to-day if he is to maintain even his pre-war standard of living. It is well known that the post-war standard of living of industrial workers is considerably higher than pre-war standards. Labour as a whole receives to-day about 100 per cent. increased money wages over the ten-year period immediately prior to the World War. Labour is the biggest item in the cost of cotton production."

The Southern cotton farmer works in the highest cost of production country in the world. Practically everything which enters into his cost of living and producing is protected by a high tariff. The operation of this same tariff practically prohibits the cotton farmer from taking in exchange for his cotton the manufactures of those countries which are his best buyers.

The Southern cotton grower is on the average being forced into a lower standard of living, and American raw cotton, which for half a century has been the greatest single factor in maintaining a favourable balance of trade for this country, has lost its dominant world position.

Barring a Government subsidy, the only course open to the Southern cotton farmer, even if he is to maintain his present comparatively low standard of living, is to relinquish, year by year, through a systematic reduction in acreage, a further substantial part of his portion of the world's cotton trade. Coincidentally, there must be an improvement in quality and an increase in yields through fertilization and better production methods."

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EGYPTIAN COTTON

Egypt's Cotton Acreage Limitation.

The proposal to reimpose the law restricting the area of land which may be sown with cotton in any one year to one-third of the total cultivated land in Egypt is certain to arouse lively controversy, especially in view of last year's experience when the restriction was obviously not rigidly enforced. The limitation of cotton cultivation in Egypt is not a post-war novelty. Drastic regulations were imposed during the war period, and severe penalties were inflicted on farmers who planted cotton on more land than had been authorized. But war-time enactments were framed with a special purpose in view. At that time cotton prices were so high that very large profits were made from the country's staple crop. On the other hand rigid control was maintained over prices of food products. The cultivation of cereals yielded only moderate gains compared with the enormous returns obtainable from cotton growing. Had not the military authorities then enforced a firm control over agriculturists, practically the whole cultivable area of Egypt would have been sown with cotton. The country would have been starved of essential foodstuffs, and in order to remedy this state of affairs the Allies would have been compelled to divert to the task of carrying foodstuffs to Egypt much shipping tonnage which was urgently required elsewhere. War-time regulations were continued for several years after the conclusion of hostilities because the phenomenal values of cotton perpetuated the conditions which had rendered legislation necessary between 1914 and 1918. When, seven years ago, the restrictions were abolished, it was believed that they had disappeared for good. Since then, however, an advocacy of cotton-area restriction has grown up on new grounds. Alarmed by the rapid fall in cotton values, and inspired by reports of what had been achieved in the direction of rubber price stabilization by concerted restrictive action on the part of rubber planters, a section of Egyptian agriculturists demanded and obtained renewed official limitation of the cotton area. This demand was opposed by a numerous body of growers and by practically all exporters, who pointed out that the United States of America produce over half the world's cotton, that India grows more than one-fifth, while Egypt's contribution is not much above one-twentieth of world consumption. In these circumstances, said the opponents of acreage limitation, restrictive measures in this country could exert no appreciable effect on world prices, while at the same time they prevented the agriculturist from sowing the maximum area with the crop which, despite lower prices, was still the most profitable which he could grow. To this argument the advocates of control rejoined that Egypt's finest cotton —Sakellarides—was of a quality unrivalled by the product of any other country; that manufacturers of certain classes of cotton goods must have Sakellarides cotton, and that, therefore, the price of this grade could be artificially stimulated irrespective of the values of American and Indian cottons. This view, once widely held in Egypt, is now rejected by all but a small minority of those interested in the cotton-growing industry. Experience has amply proved that, while Sakellarides cotton is preferred by manufacturers for certain purposes, the preference ceases to be decisive as soon as the price margin between Sakellarides and other fine grades exceeds a certain figure. The protagonists of limitation have thus been compelled to seek a new argument. This they have found in the declining yield of Egyptian cotton lands, which to-day produce crops of not much more than half the bulk obtained thirty years ago. An obvious and easy explanation of this falling-off is to be found in over-cropping. But, while it is easy to ascertain that Egyptian lands have been over-cropped with cotton and that this is the cause of reduced yields, it is much more difficult to produce convincing evidence in support of that view. Official statistics, so far as they are available, seem to point in the opposite direction. Below is an extract from Government returns showing a comparison of the yields of State cultivation and of private lands. On the State lands concerned cotton was sown on the same area only once in three years. On the private-owned farms cotton was grown every alternate year. The yield is shown in each case as an average over a period of five years. It will be seen that the land cultivated with cotton every other year gave a larger yield in each of the five-year periods except one (1915–1919).

Years	State Cultivation (triennial) lbs. per feddan	Private Cultivation (biennial) lbs. per feddan
1895–1899	514	547
1900–1904	459	467
1905–1909	341	403
1910–1914	397	427
1915–1919	370	358
1920–1924	355	365

It should be noted that the averages given are not of the total yield of each of the areas during the five-year period concerned, but of the average of the yields per feddan during each year when cotton was grown. These figures cannot be taken as conclusive, since they relate to areas too limited to form a basis of a definite judgment. But they are at least significant and suggest that it would be wise to await a full investigation before accepting the theory that Egypt's cotton yield is declining because the land is put under the same crop too frequently and that the cotton area should therefore be arbitrarily limited.

From an economic standpoint it is undoubtedly desirable that the policy of concentration upon one crop should be changed. It is doubtful whether Egypt has hitherto suffered by devoting too much attention to cotton, to the neglect of other products, because, even at present price levels, cotton still remains the most profitable crop that can be grown here. Should values fall much lower, however, cotton would be definitely a non-paying crop to grow, and,

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because of its culture being the principal aim of nearly every agriculturist, the whole industry would be faced with a crisis from which emergence would be difficult because the potentialities of alternative products have until now been neglected.

U.S.A. TARIFF ON EGYPTIAN COTTON.

A duty of 7 cents per lb. was placed on all cotton having a staple of 1⅛ ins. or more entering U.S.A. by the Senate on March 3. The motion was introduced by Senator Shortridge, of California, who opened his argument that the proposed amendment was favoured by " every cotton-growing State."

Discussing the competition of foreign cotton, Senator Shortridge declared that Egypt is U.S.A.'s greatest competitor in cotton production, averaging 395 lbs. per acre to 153 lbs per acre in the United States. " Thus they produce far more cotton per acre at far less price," he said.

" It is not generally known that we import as much cotton as we do," he continued. " In 1928 we imported a total of 457,804* bales of all classes, of which 315,325 was long staple. From one-third to one-half of the long staple cotton consumed in this country is imported from abroad."

"There is a prevailing impression that cotton has always been on the free list," he said. " This is not true. It has been dutiable throughout most of the history of the country, it should have remained there, and should now be replaced."

He declared that in 1921, when cotton was placed under an emergency rate, importations of cotton from Egypt dropped from 485,000 bales in 1920 to 87,000 in 1921.

Senator Shortridge concluded his argument by submitting a resolution from the State Legislature of Mississippi urging the placing of such a rate on long staple cotton.

Senator Heflin, of Alabama, expressing himself as favouring the amendment, offered an amendment to the amendment placing a rate of 4 cents. per lb. on short staple cotton. He withdrew the amendment at the request of Senator Shortridge until action was taken on the first amendment.

Senator Herbert, of Rhode Island, in opposing the amendment declared that " it will not accomplish the purpose the Senator has in mind. The imposition of a duty on long-staple cotton will not change its consumption in this country. The same amount will have to be imported for the manufacture of certain products, which will only result in a higher price on these products to the ultimate consumer," he said. "Further, he will still have a surplus in this country, which will have to compete with the Egyptian cotton excluded from the country by this embargo. The world relation of supply and demand will not be changed, but will merely increase the cost of manufacture of certain American products."

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*This figure is obviously a mis-statement. Imports of raw cotton during the 12 months ended June, 1928, by U.S.A. amounted to 175,450,000 lbs. Mill consumption for the 12 months ending July, 1928, for other than American cotton was 27,000 bales East Indian, 144,000 Egyptian, 64,000 of others, with a total of 235,000 bales. Senator Shortridge has evidently assumed that all bales entering U.S.A. are of an approximate weight of 400 lbs., whereas over two-thirds of this cotton is Egyptian in bales of 750 lbs. (N.S.P.)

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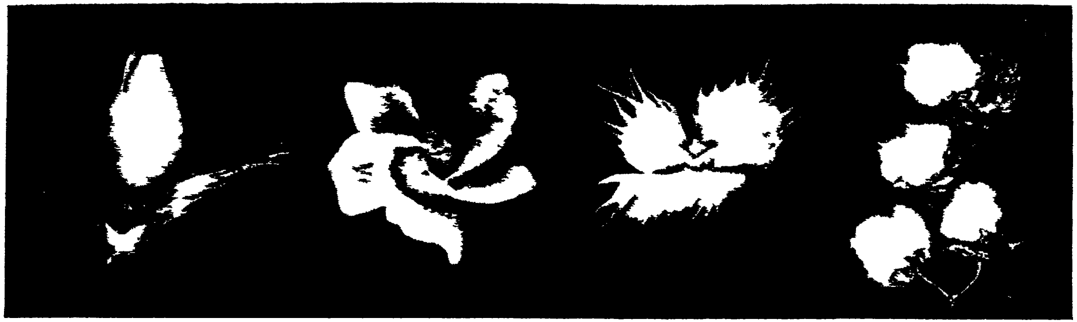
Maarad Cotton.

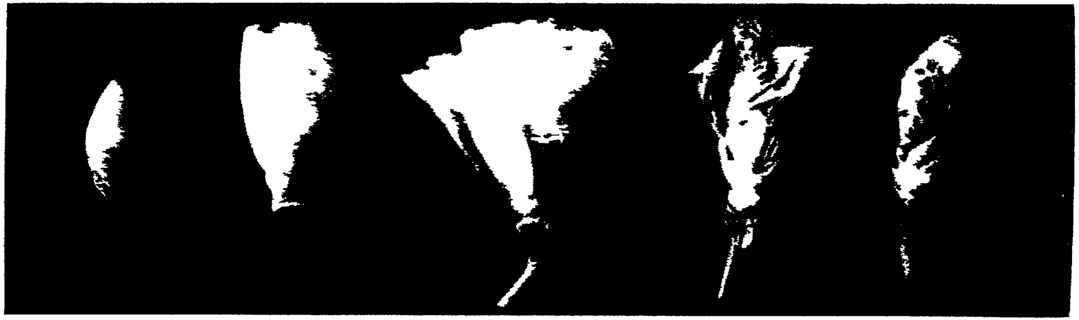
During his visit at Cairo Mr. Arno S. Pearse obtained from the Cotton Museum a number of interesting photographs, of which we publish the first in the present issue. Further illustrations of Maarad and other kinds of cotton will be published in later editions.

A Maarad Cotton Field, ready for picking. *Photo by R. S. Sennitt*

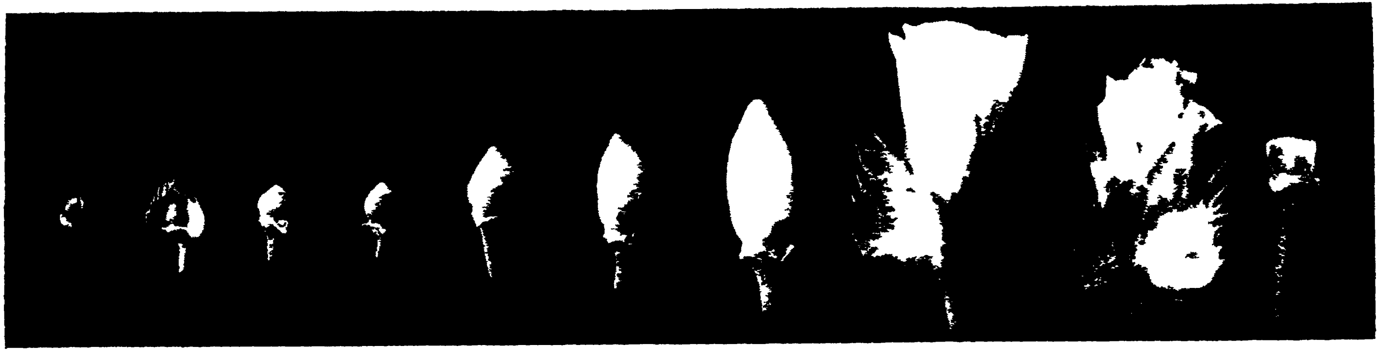


Maarad Cotton.

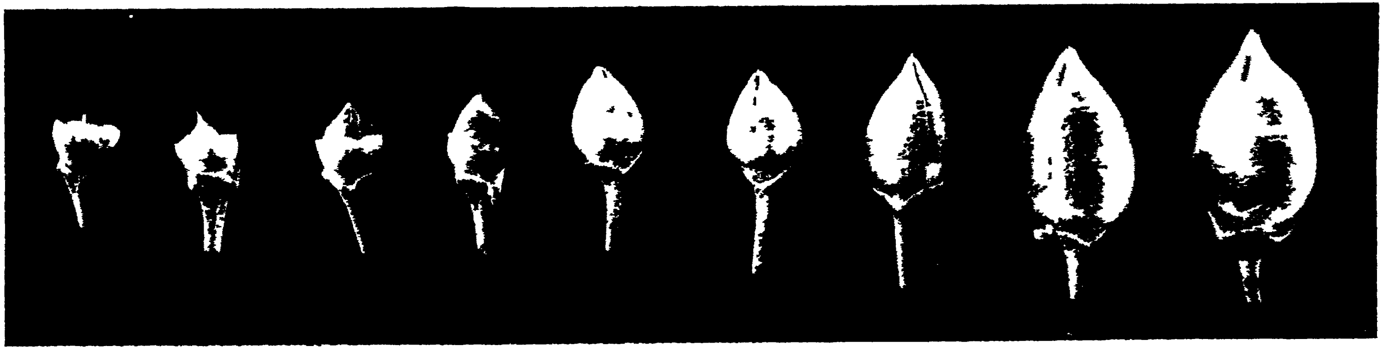
1 Flower bud before opening 2 Flower early morning stage during the process of opening 3 Boll two days after fertilization 4 Fruiting branch with ripe bolls



Forty-eight hours in the development of the Cotton Flower (Shown on Maarad Cotton.)



Maarad Cotton A series showing the development from square to fertilized flower.



Maarad Cotton A series showing the development of the Boll

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MARKET REPORTS.

Messrs. P. Augustino & Co., under date April 10, communicate the following:—

The principal reason for the prevailing pessimism between Exchange quarters seems to be the apprehension that the Government might decide before the coming of the new crop to resell on the spot market very large lines from the cotton received this season against contracts. It has been even rumoured that 1,500 bales had been already sold to two exporters at rather below what the cotton had cost the Government. This rumoured sale has received no confirmation until now, and does not seem to be accurate. What, however, seems to be pretty certain is that several exporters have applied to the Government to enquire on what terms they might buy some of the Government cotton, in view of having an idea of the basis on which they might make offers to spinners abroad. It is also very probable that to begin with the pretensions of the Government will be very moderate, although it seems that there might be no question of selling anything below cost price, including all the expenses incurred for receiving and storing and interest on the money. It is also probable that any eventual buyer will have to justify that the cotton will go direct to the consumer taking the obligation not to resell in the Alexandria market. The general market interprets the eventual sale of the Government cotton, even on the conditions as stated above, as a distinctly bearish factor for the new crop deliveries. However, it is quite a question whether this interpretation is justified or not.

Crop. Locusts have appeared in nearly every district in both Upper and Lower Egypt. Very few instances of actual damages are reported until now, so it is difficult to gauge from them the extent of possible eventual damage to the cotton crop. The Government is quite alive to the menace, and very energetic measures have been already decreed for preventing the invasion of taking dangerous dimensions. Nothing positive can be said, in the absence of precedents in recent years, which might help to form an idea of the impending eventual damage to the crop.

Messrs. Reinhart & Co., Alexandria, in their market report under date April 11, write as follows:—

Government purchases up to April 11 are as follows:—

	Sakellaridis. Cantars.	Ashmouni. Cantars.
Received in November, 1929 ...	9,250	
December, 1929		235,000
,, January, 1930	99,500	
,, February, 1930		96,000
Purchase of March, 1930	643,250*	
,, April, 1930		430,500*
Total cantars	752,000	... 761,500

* Subject to correction.

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The decision regarding the resale of this cotton is still outstanding.

The improvement in trade reported at the end of March and at the beginning of April seems to have suffered a certain check by disturbances in India. The demand for our cotton has been rather slower than expected. A growing interest is, however, manifested for low Sakellaridis and Uppers, and especially for all grades of Nahada and Maarad, which are relatively cheap.

Stock figures giving details of varieties have been published by the Government statistical department as follows:—

Stock existing in Alexandria on February 28, 1930:—

	Cantars.		Cantars.
Sakellaridis	1,566,785	Maarad	56,277
Fuadi	44,050	Nahda	115,685
White	23,406	Scarto	5,189
Pilion	137,364	Sekina	26,791
Ashmouni	1,609,222	Other kinds	12,459

Total cantars ... 3,597,228.

In the meantime this stock has grown to about 4,000,000 cantars. There is a surplus of about 1,000,000 cantars compared to normal seasons. Exports are rather poor, but considering that spinners have no stock and merchants no consignments abroad, we may have to meet a steady demand throughout the summer months.

NEW CROP.

The Ministry of Agriculture issued the following reports concerning the state and prospects of the crop in March:—

Cotton. "The weather was changeable and accompanied by cold winds, which delayed sowing in the northern region of the Delta up to the middle of the month. Nor was it quite temperate in other regions during this period. It became favourable, however, for germination and growth in the latter half of the month. Had it not been for the changeability of the weather in the first half of the month, the hesitation of cultivators and the attack of cattle in some districts by foot-and-mouth disease, the area actually sown would have been larger. The area sown in the northern part of the Delta is smaller this year by 20 per cent. than it was last year, but the delay in the southern part is less than in the northern part. Work is actively going on in Upper Egypt for the completion of the sowing of the rest of the areas. Reports to hand show that the early-sown crop is growing favourably and that the rate of germination is satisfactory. Resowing and watering of those areas have commenced."

During the week under review the temperature has been very favourable, and the crop is progressing in a normal way. Some anxiety is felt about the appearance of locusts both in Upper and Lower Egypt. The Egyptian Government has opened a credit of £70,000 to combat these insects, and part of the army has been mobilized for this task. The measures taken so far have prevented any serious damage.

Messrs. The Egyptian Produce Trading Co., Alexandria, under date April 10, write as follows:—

Near deliveries naturally show little change, but new crops have fluctuated, October Uppers closing with an advance of 38 points, whereas November Sakels have lost ground to the extent of 23 points. New York May has improved by 56 points since the issue of our previous report.

Business on the whole was rather quieter this fortnight. American buyers favoured us with several orders for the usual run of Uppers, all enquiries from that quarter being for immediate shipment. Lancashire effected some sporadic purchases on the spot in Liverpool, mostly at prices below replacement cost. The tone in Manchester is better, and, although spinners' margins remain small, the volume of trade shows an expanding tendency. The Continent showed little interest in our growths, such business as they did place being chiefly for low-style Uppers and Sakels, or for "sundry" varieties, i.e., for those lines which are not tenderable, and have therefore benefited but partially by recent Government action.

The advance which has occurred during the past few weeks in the price levels of new crops seems to have temporarily stifled spinners' interest in those positions. The futures market is consequently confined to professional dealings, and, as is usual in such cases, it is subject far more to psychological than to commercial influences. The threat of a locust invasion was in the forefront during the fortnight, swarms heading in the direction of the Nile Valley from Palestine and the Sinai Peninsula. The fears of possible damage to young cotton plants caused November to soar to over $27, but the Government has used every means in its power to destroy the menace, and the success that is attending its efforts has renewed confidence, incidentally causing a fresh downward move to $26.55. It cannot, however, be said that we are quite out of the wood yet, as the danger still exists.

Receipts, since the beginning of the season amount to 7,474,632 cantars, and exports to 4,642,052 cantars, as against 7,360,408 cantars and 5,494,232 cantars respectively at the same time last season. Stocks at Minet-el-Bassal now total 3,096,803 cantars, against 3,019,405 cantars a year ago.

Spot Market. The turnover during the fortnight amounted to 20,198 bales, as against 16,174 the previous fortnight, and 28,946 during the same period the year before.

The demand for Sakel continues on a restricted scale, but the basis remains firm by reason of the large quantities tendered to the Government in March and the prospect of fresh tenders next month.

There has been more enquiry for Uppers at enhanced premiums ($1/8 over those of the preceding fortnight), here again the reason being heavy tenders to the Government through April contracts.

Interest in Pilion and Nahda has improved, but Fouady and Maarad are not sought after.

The Government so far has received 753,500 cantars and 739,750 cantars of Sakel and Uppers respectively.

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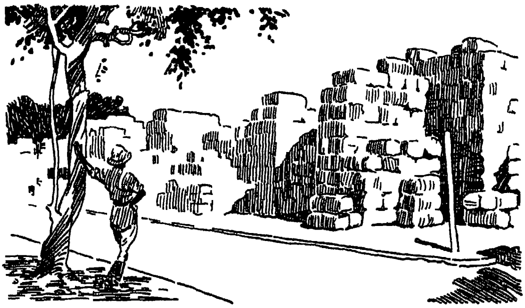

East Indian Cotton.

Final Cotton Forecast, 1929-30.

Provinces and States	Acres (thousands) 1929-30 Final	Acres (thousands) 1928-29 Final revised	Out-turn (thousands of bales of 400 lbs each) 1929-30 Dec	Out-turn 1929-30 Final	Out-turn 1928-29 Final revised
Bombay	6,588	7,367	1,071	1,090	1,358
Central Provinces and Berar ..	5,167	5,078	1,103	1,127	1,224
Madras	2,467	2,394	419	512	519
Punjab	2,496	2,841	716	777	619
United Provinces	932	715	288	289	255
Burma	323	318	67	67	56
Bihar and Orissa	69	78	13	13	14
Bengal	78	79	21	21	18
Ajmer-Merwara	34	44	11	11	21
Assam	44	44	15	15	17
North-West Frontier Provinces	17	17	4	4	4
Delhi	3	2	1	1	1
Hyderabad	3,531	4,002	984	1,018	994
Central India	1,393	1,287	242	246	252
Baroda	771	793	138	127	68
Gwalior	633	645	98	89	107
Rajputana	506	476	107	104	123
Mysore	69	76	22	22	23
Total	25,121	26,256			

Description of Cotton	Acres (thousands) 1929-30 Final	Acres (thousands) 1928–29 Final revised	Out-turn (thousands of bales of 400 lbs. each 1929–30 Dec.	Out-turn 1929–30 Final	Out-turn 1928–29 Final revised
Oomras :					
Khandesh	1,362	1,334	246	245	277
Central India	2,026	1,932	340	335	359
Barsi-Nagar .. .. Hyderabad-Gaorani ..	3,575	3,924	988	1,001	883
Berar .. .. .. Central Provinces ..	5,167	5,078	1,103	1,127	1,224
Total	12,130	12,268	2,677	2,711	2,743
Dholleras	2,415	2,929	280	340	422
Bengal Sind :					
United Provinces	932	715	288	289	255
Rajputana	540	520	118	115	144
Sind-Punjab	1,979	2,232	581	580	536
Others	76	85	15	15	16
Total	3,527	3,552	1,002	999	951
American :					
Punjab	825	974	217	245	189
Sind	22	29	4	5	6
Broach	1,190	1,162	274	243	134
Coompta-Dharwars	1,625	1,744	287	293	398
Westerns and Northerns ..	1,470	1,742	178	201	342
Coconadas	227	237	38	45	46
Tinnevellys	602	608	90	160	160
Salems	239	195	33	41	35
Cambodias	389	357	137	146	155
Comillas, Burma and other sorts	460	459	103	104	92
Grand total	25,121	26,256	5,320	5,533	5,673

Spinning Tests of Indian Cotton.

The Indian Central Cotton Committee have recently made three spinning tests on three different varieties of Indian cottons. The samples were supplied by the East India Cotton Association, after inspection and approval by their Standards Committee.

Sample No.	*Cotton.*		*Season.*	*Weight (lbs.)*
670	Fine M.G. Berar (Karanja)	...	1929–30	11
663	Superfine Berar (Malkapur)	...	1920–30	11

I. GRADER'S REPORT.

———	Fine M.G. Berar (Karanja)	Superfine Berar (Malkapur).
Contract valued under	Fine Berar.	Fine Berar.
Class	Superfine.	Superfine to Extra Superfine.
Colour	White.	Normal.
Staple Length ...	$\frac{7}{8}$ inch.	$\frac{3}{8}$ inch.
Staple Strength ...	Strong.	Weakish.
Regularity	Irregular	Irregular.
Value above or below contract rate ...	Rs.8 on.	Rs.5 on Fine Berar.
Basis	Par Fine Oomra No.3.	Par Fine Oomra No. 3
Date of valuation ...	28–1–30.	18–1–30.
Remarks	———	— - —

II. SPINNING TESTS.

1. *Treatment*: These cottons were passed through the Porcupine, Crighton (twice), Hopper, Scutcher (3 times), Card, Drawing (2 heads), Slubber, Inter, Rover, and spun from single hank roving in Ring Frame No. 1.

2. *Spinning Master's Report*:—

(*a*) *Cotton*:

Fine M.G. Berar: Creamy white; fairly leafy; has a harsh feel; contains 1.25 per cent. unginned seeds, otherwise well ginned; regularity in staple length and strength of staple are both fair.

Superfine Berar: The cotton is creamy to creamy white; fairly leafy; otherwise well ginned; on the rough side in feel; contains too many unginned seeds (1.75 per cent); staple is even in length and fairly strong; this sample is a shade less dull but otherwise very similar to sample 662 (Superfine Khandesh, Dhulia). Excessive yarn breakage in 10's A necessitated slower spinning speed.

(*b*) *Yarn*:

Fine M.G. Berar: The yarn is clean, fairly even, a little neppy and fairly slubby.

Superfine Berar: The yarn is clean, almost free of nep, a trifle slubby but fairly uneven · a poor yarn with too many raw spots.

3. *Spinning Test Details and Results*:—

SPINNING TEST RESULTS ON FINE AND SUPERFINE BERAR COTTONS.

1	2	3	4	5	6	7	8	9	10	11	12	13
					Waste Percentages				Ring Frame Particulars*			
Sample No.	Cotton	Date of Spinning	Counts Nominal	Weight of Sample. lbs.	Blow Room Loss	Card Room Loss	Spinning Loss	Total Loss	Yarn Breakages per 100 spindles per hour	Front Roller Speed R P.M.	Draft	Turns per inch
670	F.M.G. Berar (Karanja)	8 2-30	10A	10	11·1	9·0	0·5	19·5	110	175	5·21	12·63
"	"	"	10B	10	—	—	—	—	113	104	5·32	14·29
663	Superfine Berar (Malkapur)	4 2-30	10A	9	12·3	9·4	0·5	20·9	80	172	5·21	12·63
"	"	"	10B	9	—	—	—	—	30	193	5·21	14·29

14	15	16	17	18	19	20	21	22	23	24	25
Yarn Test Results									Temperature °F.	Relative Humidity %	
Lea			Ballistic								
Counts Actual	Strength lbs.	Count-Strength Product	Counts	Work of Rupture (inch lbs)	Count Work Product	Evenness Class	Neps per yard	Turns per inch (Actual)	Spinning Room	Spinning Room	Testing Room
9·9	49·5	490	9·9	168·8	1671	4	2·0	12·0	80	65	60
9·9	83·5	827	10·1	184·0	1858	5	2·25	13·6	80	64	63
10·3	44·8	461	10·3	143·4	1477	6	1·5	12·0	82	67	52
10·1	79·6	804	10·4	173·0	1700	6	1·75	13·6	80	65	54

* The ring frame front roller used in the spinning of these yarns has a diameter ⅞ inch.

Sample No.	*Cotton.*	*Season.*	*Weight (lbs.)*
666	F.G.M.G. Muttia (Bhavnagar) ..	1929–30	11
667	Fine M.G. Muttia	1929–30	11

I. GRADER'S REPORT.

– ——	F.G.M.G Muttia.	Fine M.G. Muttia.
Contract valued under	Fully Good Muttia.	Fully Good Muttia.
Class	Fully Good.	Barely fine.
Colour	Greyish.	Dull.
Staple Length ...	¾ inch.	¾ inch.
Staple Strength ...	Good to strong.	Fair.
Regularity	Rather irregular.	Normal regularity.
Value above or below contract rate ..	Par.	Rs.5 on.
Basis	Rs.15 off Fine Oomra No. 3.	Rs.15 off Fine Oomra No. 3.
Date of valuation ...	28–1–30.	28-1 30.
Remarks	Better than average Bhavnagar.	- - —

II. SPINNING TESTS.

1. *Treatment*: These cottons were passed through the Porcupine, Crighton (twice), Hopper, Scutcher (3 times), Card, Drawing (2 heads), Slubber, Inter, Rover, and spun from single hank roving in Ring Frame No. 1.

2. *Spinning Master's Report*:—

(*a*) *Cotton*:

F.G.M.G. Muttia: The cotton is a very wasty one; creamy; dull; very leafy; contains 2.2 per cent. ginned and unginned seeds; ginning has left the material in a free and open condition, but has cut the seeds badly; a very poor sample indeed; staple is fine, regular in length, and strong; the card web is clear; sliver clean, and flat strips light in weight, i.e., 10 full-size strips weighed 13.8 grams.

Fine M.G. Muttia: Creamy; less dull than F.G.M.G. Muttia (sample No. 666); a trifle stained and very leafy; ginning has knotted the material a good deal and cut the seeds very badly indeed; the sample contains 4.25 per cent. ginned and unginned seeds; card web somewhat neppy; flat strips heavier than the "fully good" sample No. 666, weighing 17 grams for 10 strips.

(*b*) *Yarn*:

F.G.M.G. Muttia: The yarn is clean, fairly even, fairly free of nep, and possesses only an occasional slub.

Fine M.G. Muttia: The yarn is clean, even, free of nep and slub; a good round thread.

3. *Spinning Test Details and Results*:—

SPINNING TEST RESULTS ON FULLY GOOD AND FINE MUTTIA COTTONS

1	2	3	4	5	6	7	8	9	10	11	12	13
					Waste Percentages				Ring Frame Particulars*			
Sample No.	Cotton	Date of Spinning	Counts Nominal	Weight of Sample lbs	Blow Room Loss	Card Room Loss	Spinning Loss	Total Loss	Yarn Breakages per 100 spindles per hour	Front Roller Speed R P M	Draft	Turns per inch
666	F.G.M G. (Bhavnagar)	5–2–30	10A	10	20 7	9 1	0 2	28 0	0	196	5 42	12 63
,,	,,	,,	10B	10	—	—	—	—	20	193	5 53	14 29
667	F M G Muttia	5–2–30	10A	10	20 6	9 5	0 3	28 4	10	104	5 42	12 63
,,	,,	,,	10B	10	—	-	-	—	40	196	5 63	14 29

14	15	16	17	18	19	20	21	22	23	24	25
Yarn Test Results									Temperature °F	Relative Humidity	
Lea			Ballistic								
Counts Actual	Strength lbs	Count-Strength Product	Counts	Work of Rupture (inch lbs)	Count Work Product	Evenness Class	Neps per yard	Turns per inch (Actual)	Spinning Room	Spinning Room	Testing Room
10 1	78 0	788	10 3	181 4	1868	5	2 25	12 1	82	66	66
9 9	115 7	1145	10 0	203 2	2032	5	2 75	13 7	82	63	57
9 8	96 7	948	9 7	207 2	2010	4	1·5	12 0	81	64	61
10 0	120 1	1201	10 0	207 0	2070	4	2 25	13 6	81	62	64

* The ring frame front roller used in the spinning of these yarns has a diameter ⅞ inch.

Sample No.	*Cotton.*	*Season.*	*Weight (lbs.)*
668	F.G.M.G. Latur	1929–30	11
669	F.G.M.G. Nanded	1929–30	11
671	F.M.G. Punjab-American (Okara) ...	1929–30	9¾

I. GRADER'S REPORT.

	F.G.M.G. Latur.	F.G.M.G. Nanded.	F.M.G. Punjab-American.
Contract valued under	Fully Good Broach No. 2.	Fully Good Broach No. 2.	Fully Good Broach No. 2.
Class	Fine.	Fully Good to Fine.	About Superfine
Colour	White.	A little dull.	Greyish.
Staple Length ...	1 inch.	$\frac{15}{16}$ inch.	$\frac{13}{16}$ inch.
Staple Strength ...	Very Strong.	Very Strong.	Varied.
Regularity	Regular.	Regular.	Very Irregular.
Value above or below contract rate ...	Rs.50 on F.G. Broach, April–May.	Rs.40 on F.G. Broach, April–May.	Par.
Basis	——	——	Par, Fully Good Broach No. 2.
Date of valuation ...	28–1–30.	28–1–30.	28–1–30.
Remarks	Black leaf.	Not so silky or waxy as F.G. M.G. Latur.	Heavily mixed with *desi*.

II SPINNING TESTS

1 *Treatment* These cottons were passed through the Porcupine, Crighton (twice), Hopper, Scutcher (3 times), Card, Drawing (2 heads), Slubber, Inter Rover, and spun from single hank roving in Ring Frame No 1

2 *Spinning Master's Report* —

(*a*) *Cotton*

F G M G Latur Creamy white bright, leafy, has a good soft feel, very well ginned, except for leafiness and 1 9 per cent ginned and unginned seeds, the sample is a good one, staple is fairly fine and of good strength, card web clear, sliver clean, and flat strips light weight at 1 4 grams each

F G M G Nanded Creamy white, brightest, leafy and a trifle stained, has a good bodied feel fairly well-ginned, and contains 1 4 per cent ginned and unginned seeds, the staple is even and of fair strength, card web is a trifle neppy, and flat strips medium weight at 1 7 grams each

F M G Punjab-American The cotton is somewhat leafy, creamy white, a good deal stained and has a good bodied feel, the lint is in a fairly knotted condition as result of ginning, but has responded to treatment and yielded a good clear card web the staple is of good strength, fairly even in length, but has a slightly harsh feel

(*b*) *Yarn*

F G M G Latur The yarn is clean and even, with a little nep

F G M G Nanded The yarn is clean and even, but a trifle neppy

F M G Punjab-American The yarn is clean, fairly even, fairly neppy, and a trifle slubby

3 *Spinning Test Details and Results* —

SPINNING TEST RESULTS ON LATUR NANDED AND PUNJAB AMERICAN COTTONS

1	2	3	4		6	7	8	9	10	11	12	13
					— Waste Percentages —				— Ring Frame Particulars* —			
Sample No	Cotton	Date of Spinning	Counts Nominal	Weight of Sample lbs	Blow Room Loss	Card Room Loss	Spinning Loss	Total Loss	Yarn Breakages per 100 spindles per hour	Front Roller Speed R P M	Draft	Turns per inch
668	I G M G Latur	6 2 30	20A	10	12 2	8 3	0 3	19 7		104	21	19 8
		7 2 30	20B	10			—	—	10	[illegible]	32	20 2
669	I G M C Nanded	6 2 30	20A	10	14	9 6	0 2	22 5	0	101	21	19 8
		7 2 30	20B	10					0	103	2	20 23
671	P M C Punjab American	10 2 30	20A	9	10 4	9	0 8	19 1	11	150	7 10	19 8
			20B	9	—				1 0	101	7 10	20 23

14	15	16	17	18	19	20	21	22	23	24	25
Yarn Test Results									Temperature °F	Relative Humidity %	
— Lea —			— Ballistic —								
Counts Actual	Strength lbs	Count Strength Product	Counts	Work of Rupture (inch lbs)	Count Work Product	Evenness Class	Neps per yard	Turns per inch (Actual)	Spinning Room	Spinning Room	Testing Room
19 7	86	1704	19 9	129 4	[illegible]	4	25	17 1	81	55	56
19 8	84 6	16[illegible]	20 0	1 3 8	2676	4	4 25	19 2	82	60	56
20 0	81 8	1636	20 4	119 2	2432	4	4 25	17 2	81	55	55
19 8	84 4	1671	19 8	125 0	2475	4	4 2	19 2	82	60	56
19 6	46 6	915	20 2	93 2	1883	4	4 25	17 2	80	62	65
19 8	60 7	1202	20 3	100 2	2034	5	3	19 2	81	63	65

* The ring frame front roller used in the spinning of these yarns has a diameter [illegible] inch

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BRAZILIAN COTTON.

Messrs F Albrecht & Co , Liverpool communicate the following report —

The present Brazilian cotton crop has proved one of the most successful in the history of the trade Official figures are not yet available, but the production is estimated at approximately 750,000 bales, compared with 633,000 bales in 1928 29 and 608,000 bales in 1927/28

The unfavourable financial and industrial position in Brazil exercised a very adverse effect on the demand for raw cotton on the part of the mills in the South, and producers and shippers have been pressing cotton for sale ever since the commencement of a very early season A good deal of business had been booked by the end of June, and though the better qualities are now practically exhausted there is scope for further contracts of low cotton at reasonably attractive prices The export business has progressed on exceptionally extensive lines The bulk of the turnover took place before the end of the year, for, with the heavy decline in values, holders in Brazil commenced to withdraw their cotton from the market and are still inclined to hold back in the hope of higher levels later on

The basis, consequently, has hardened somewhat during the past month or so, and our latest cables advise us that the South is showing more interest in the remnant of desirable cotton which still can be procured

One of the features of the season has been the increased use of "outsiders" to replace American cotton This has been particularly pronounced in Lancashire, and Brazils have proved very attractive and have given full satisfaction both as regards quality and staple We have heard complaints regarding the shorter and softer cotton from certain of the more southerly districts, but the "extra-stapled" North Brazilian cotton has fully justified the confidence placed in it The British Import figures are eloquent of the expanding demand which Brazilian cotton has enjoyed this season —Imports to date 338,080 bales against 132,000 bales last year The basis this season is the lowest which has been known for many years

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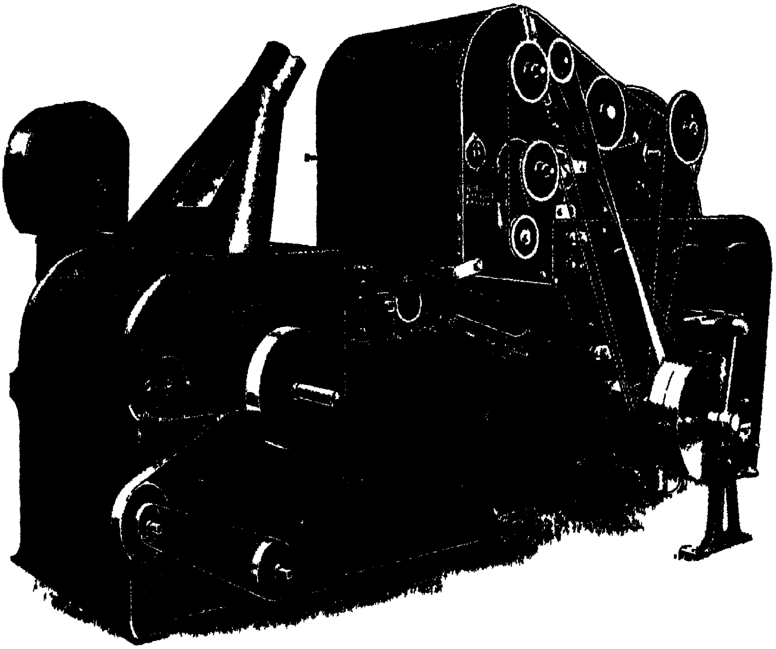

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Long *v.* Normal Drafts.

Bulletin No. 2, Series 33, issued by the Lowell Textile Institute, gives an account of experiments undertaken in connection with long and normal drafts and it describes tests made to determine the effect of long draft on cotton spinning when no process of roving is eliminated. We reprint the article in part herewith:—

Two of the more prominent long-draft systems and one ordinary-draft system were used. One short frame was equipped with ordinary drawing rolls on one side and long-draft rolls on the other side. A second frame was equipped with the other long-draft system. These two frames, both tape driven, were set up to have the same spindle speed, 9,000 r.p.m. Rings of $1\frac{5}{8}$-in. diameter were used at every spindle. The same travellers were used on both frames for the spinning of any one count.

The frames were adjusted to give as near the same counts as possible. All three lots of yarn were spun during the same hours and under the same conditions.

The staples used were from 1 in. to $1\frac{3}{16}$ ins. The counts spun ranged from 18's to 40's, some from single roving and some from double roving. With one exception, the yarns of any one count were spun from rovings of the same staple. The only count spun from two staples was 27's with a low draft. Inasmuch as another lot of 27's was spun using the same staple for each system, this merely gives an extra test for this count.

The spinning draft layout for each count was as follows: In each case the draft used on the ordinary system is given first and that of the two long-draft systems, second:—

Counts	Staple ins.	Roving		Draft
18	1	4·30	2	8·375
		3·00	2	12·00
24	1	4·30	2	11·15
		3·00	2	16·00
27A	$1\frac{3}{16}$	3·67	1	7·1
		1·27	1	21·2
27B	$1\frac{3}{16}$	3·67	1	7·1
	$1\frac{1}{8}$	1·96	1	13·8
30	$1\frac{3}{16}$	3·67	1	8·2
		1·27	1	23·6
20	$1\frac{1}{4}$	2·60	1	7·7
		2·60	2	15·38
40	$1\frac{3}{16}$	5·00	1	8·00
		3·67	2	22·00

After conditioning, the resultant yarns were tested both by the single strand and the skein method. To arrive at a strength constant, the strength was multiplied by the actual average count, so that the difference due to variation in count would be undetermined.

The strength results were as follows:—

SKEIN TEST SUMMARY

Strength Constants. 120-Yard Skeins

Counts	Ordinary	A	B
18	1897	2107	1996
24	1785	1967	1910
27A	2625	2660	2530
27B	2650	2745	2640
30	2308	2352	2341
20	2750	2785	2710
40	2108	2257	2282

SINGLE STRAND TEST SUMMARY

Strength Constants

Counts	Ordinary	A	B
18	6276	6639	6579
24	5888	6320	6055
27A	9266	9972	9614
27B	9657	9045	9230
30	7538	7890	7662
20	10282	10074	10210
40	6983	7132	7567

The uniformity of these yarns was tested on a special piece of apparatus which measured the thickness of the yarn with a delicate feeler and by means of a small mirror gave the readings for the variations in the yarn. The records gave the variation of the yarns in per cent. based on the average thickness. The following table gives a summary of the figures for the various yarns.

UNIFORMITY-TEST SUMMARY

Count	Ordinary	A	B
18	11·83	8·28	7·72
24	12·49	10·51	10·52
27A	11·61	11·31	9·00
27B	9·89	8·73	8·24
30	12·95	13·93	12·52
20	6·39	8·34	6·44
40	14·52	15·48	15·16

The figures of this table were plotted on the chart "Percentage Variation." The figures were grouped as in the strength charts, with the ordinary system at the left, long-draft system A in the centre, and long-draft system B at the right.

The conclusions arrived at by the investigators were as follows:—

When all these yarns were considered, it seemed logical to conclude that the A long-draft system produced yarns which averaged slightly stronger than those of the B system.

Both long-draft systems showed strengths consistently better than the ordinary system, which was the real point of comparison in these studies.

The carded yarns from the long-draft systems showed decidedly better uniformity than from the ordinary system, which did not seem to be maintained with the combed yarns.

In three out of five cases, the A system showed less uniform combed yarns than those from the ordinary system. It must be kept in mind, however, that the 20's and 40's were from single roving on the long-draft systems, which may explain this deficiency.

The combed yarns produced on the B long-draft system showed better uniformity than the ordinary yarns except for the 20's and 40's, and the 20's was practically equal to the ordinary 20's.

Taking the figures as a whole, the B long-draft system produced a more uniform yarn than either of the others and the A long-draft system produced yarns on the average slightly more uniform than the ordinary yarns. This, however, was because the carded yarns were considerably more uniform while the combed yarns were slightly less uniform.

While these tests required considerable time and covered several counts, the field was not covered sufficiently to draw general conclusions. However, these tests seemed to indicate that both long-draft systems produced slightly better yarns than the ordinary system. One system seemed to be a little superior in producing strong yarns, but the places were reversed in producing uniform yarns.

Power for Textile Mills.

By F. B. HOLT, Textile Engineer to the Metropolitan-Vickers Electrical Co. Ltd.

The owners of the Lancashire Cotton Mills at the present time are faced with many difficulties in connection with the production of yarn or cloth, at a price that will give a reasonable return on the capital invested in the industry, and at the same time meet the severe competition met with in the world's markets of to-day.

To overcome these difficulties, many suggestions have been made by experts in the trade, the general opinion being that the cost of production must be reduced, also better quality goods must be manufactured.

It is obvious that the Lancashire spinner or manufacturer cannot control the price of the raw material, as the cotton must be purchased in the open markets. Therefore their only hope is to reduce their manufacturing costs per unit of production.

The chief items in the manufacturing costs, excluding raw materials, are labour, trade expenses and power; the first two items can be reduced by increased production from the same amount of textile machinery at present installed in the mill, also utilizing every square foot of floor area, on which rent, rates and taxes are being paid, for productive machinery.

Increased production and better quality goods can be obtained

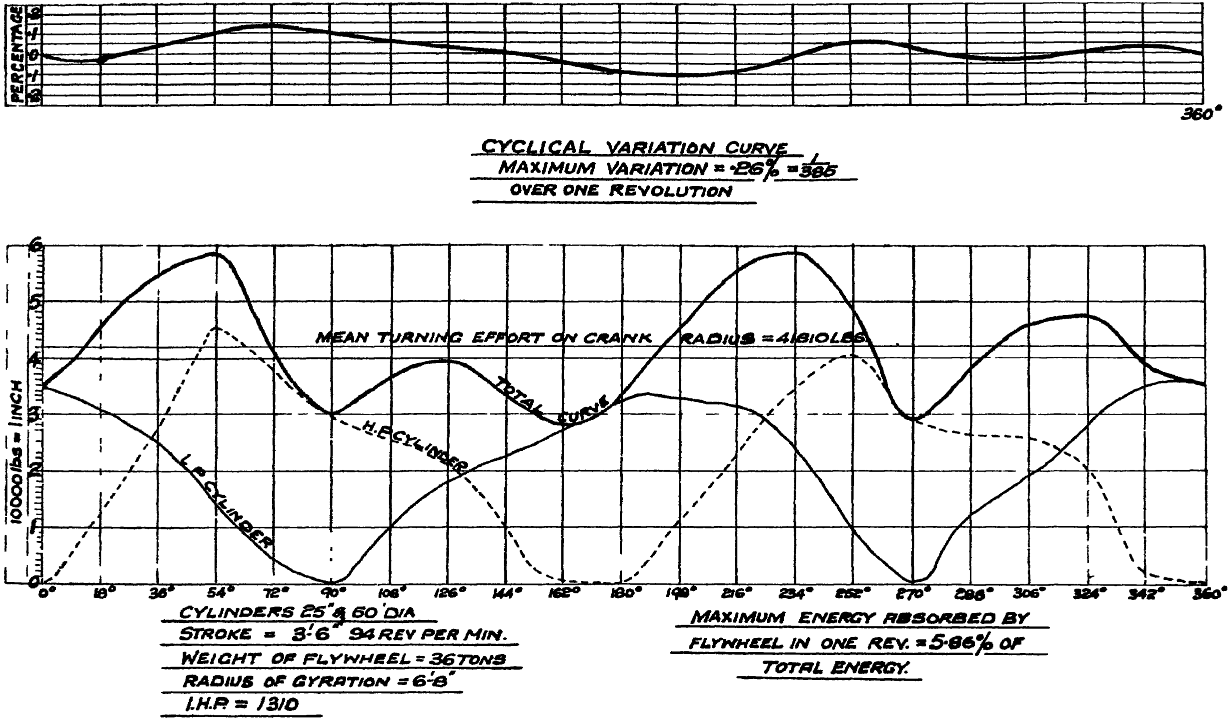


FIG. 1. CURVES SHOWING TURNING EFFORT AND FLYWHEEL VELOCITY (STEAM-ENGINE).

by the proper application and use of power at the productive machinery.

Now the cost of power is the smallest item in the cost of production. Therefore, if the power can be utilized in such a way as to reduce the labour costs by even a small fraction, it would justify a considerable increase in the cost of power.

The proper application of power in the textile industry will increase the rate of doing the work which the operative directs, also reduce the number of operations required and, together with better illumination and ventilation, increase the overall efficiency of the operative.

Therefore it is necessary for every mill owner to go into this question of power supply to his mill, and see if there is not some better method available for improving the driving arrangements.

It is a well-known fact that to get the best results and maximum production from cotton spinning and weaving machinery, it is necessary to apply an even turning moment at the driving shaft of the machine, free from cyclical irregularities, also maintain a close speed regulation.

Now so long as the cotton mill is supplied with power produced by a reciprocating engine, cyclical irregularities in speed at the productive machine is bound to occur, with the result that there is a loss of production.

There are two forms of speed fluctuations in power producers as follows:—

(1) Speed variations due to load changes.

(2) Speed variations within one working cycle.

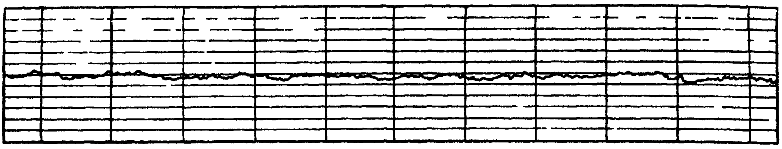
The first is due to the characteristic of the governor, and is therefore a matter of design, and all steam engines whether of the rotary, i.e., turbine, or reciprocating type, either single, compound or triple expansion, work with this disadvantage. The "Uniflow" engine, of course, follows load variations quicker than the other forms of reciprocating engines. The reason for this is that the steam supply is regulated for each working stroke in one cylinder, whilst in the compound or triple-expansion engines the steam has to pass through two or three cylinders before the full regulation effect is obtained.

To enable this form of speed variation on reciprocating engines to be compared with the rotary type of power unit, such as the steam turbine or the electric motor, some interesting figures were given by the author in a paper to the Manchester Association of Engineers, on March 8th, 1929, which have been reproduced in Table I.

TABLE I.

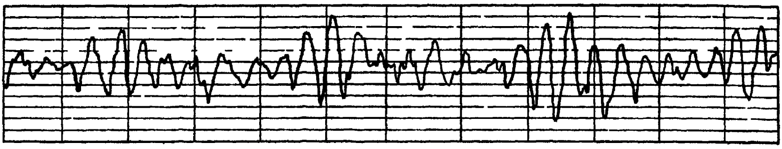
	Uniflow Engines	Compound Engines	Triple Expansion Engines	Steam Turbines	Elec. Motor
	per cent.	per cent.	per cent.	per cent.	per cent
25 per cent. load variation :—					
(*a*) Permanent speed variation	2	2	2	1	0·5
(*b*) Momentary ,, ,,	3	3½	4	1½	—
(*c*) Time in secs. in settling down to permanent speed	4	6	10	4	½

GRAPHS 1 AND 2



Vertical Scale: 1 division = 1% mean speed. *Horizontal Scale: 1 division = 5 seconds.*

SPEED VARIATIONS AT ROPE-RACE END OF LINESHAFT DRIVING 12 PAIRS SPINNING MULES.



Vertical Scale 1 division 1% mean speed. *Horizontal Scale: 1 division = 5 seconds.*

SPEED VARIATIONS AT EXTREME END OF SAME SHAFT. SPEED: 300 R.P.M. (mean)

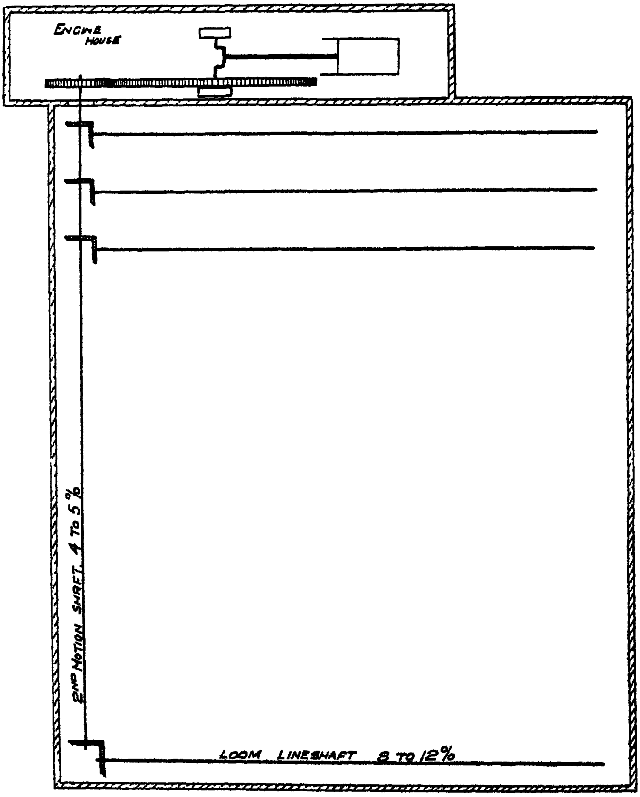


FIG. 4. SKETCH PLAN OF WEAVING SHED.

	Uniflow Engines per cent	Compound Engines per cent	Triple Expansion Engines per cent	Steam Turbines per cent	Elec- Motor per cent
50 per cent. load Variation .—					
(*a*) Permanent speed variation	3	3	3	1	1
(*b*) Momentary ,, ,,	4½	5	6	2	—
(*c*) Time in secs. in settling down to permanent speed	6	10	20	4	½
100 per cent. load variation ·—					
(*a*) Permanent speed variation	5	5	5	2	2
(*b*) Momentary ,, ,,	7	8	10	4	—
(*c*) Time in secs. in settling down to permanent speed	8	15	30	5	½

The second form of speed variation is called "coefficient of fluctuation" and is inherent in reciprocating engines only, and is caused by the periodical fluctuation of energy during each working stroke. This energy is stored in the engine flywheel. During approximately the first half of each working stroke, the energy is accelerating the flywheel speed, whilst during the second half the speed is retarded; therefore, during each working stroke the flywheel rim has a speed fluctuation which varies between a maximum and a minimum, and the difference between these two values divided by the mean speed is called the "coefficient of fluctuation," and it is this variation of speed at the flywheel rim or main rope pulley which is transmitted to the driving shafts in the mill, and causes loss of production.

Fig. 1 shows the turning effort and cyclical variation of the flywheel of a compound reciprocating engine which had been designed to give the maximum speed fluctuation of $\frac{1}{35}$, and when it is realized that the majority of mill engines driving the cotton mills have a coefficient of fluctuation of anything from $\frac{1}{40}$ to $\frac{1}{100}$ it is necessary that this matter should receive careful consideration, if good spinning and weaving is to be obtained.

It must be clearly understood that the speed-recording instruments which are generally used with mill engines are not able to record cyclic variations in speed of the engine, owing to the inertia of the recording parts in the instrument, with the result that the record on the chart is practically a straight line, and from which most mill owners are satisfied to assume that their engine cannot be causing any variations in speed. Therefore, any faulty yarn, bad weaving and loss of production could not be the fault of the engine, but must be due to some other cause.

It is claimed that if each lineshaft in the mill is driven by ropes from the main engine flywheel, the cyclical irregularity of the engine is damped out due to the flexibility of the ropes, but in actual practice this in not altogether true as will be seen from Figs. 2 and 3.

These two curves are interesting from another point of view, and illustrate the effect of speed variation in lineshafts due to torsional effect which amounted to 10 per cent at the end of the shaft remote from the rope race, with the result that bad spinning was experienced.

Now take the case of the usual weaving shed drives common to the Lancashire sheds where all the cross shafts are driven through bevel wheels from a second motion shaft which is gear-driven from the engine flywheel as shown in Fig. 4.

An engine of the type usually used under the above conditions will have a cyclical irregularity of 1 to 1½ per cent., and at the far end of the second motion shaft remote from the engine will have increased to 4 or 5 per cent., and at the end of the cross-shaft driving the looms will have increased to anything from 8 per cent. to 12 per cent., and these irregularities are the combination of the cyclical irregularities of the engine coinciding with the torsional vibrations of the shaft and due to the load conditions.

It is well known that speed variations at any point of mill shafting should be kept within 4 or 5 per cent. if good spinning and weaving are to be obtained, and there are very few mechanically driven mills which approach anything like this figure, with the result that the production of all machines is reduced below the maximum of which the machines are capable. This is shown clearly in Fig. 5.

Suppose that Curve A, Fig. 5, represented the speed variations on a loom, then if the loom was picking at the points of maximum or minimum speed bad picking would result, with the possibility of a knock off, and the trouble is usually put down to the quality of the yarn, in fact everything else except the driving.

Now so long as the power unit is located at one point only in the mill and power is transmitted to the points where it is actually required, i.e., the driving shafts of the productive machinery, by means of an elastic medium such as lineshafts, belts and ropes, speed variations and irregularities in the drives are bound to occur, which make it necessary for the machinery to run at less than the maximum possible productive speed, the result being a corresponding loss in manufacturing output.

Everything points, therefore, to the fact that to obtain the best results, it is necessary to apply a rotary power unit at each productive machine throughout the mill, so that every machine will be an independent unit, capable of running at its maximum productive speed.

The above, of course, was impossible to carry out at the time most of the Lancashire Cotton Mills were built, as the only method of obtaining power was to develop it either from water-power or reciprocating steam engines, and as the spindleage of the mills increased, it was found to be uneconomical to instal a number of small steam engines to drive sections of the mill, with the result that having no other alternative available, all the power required was developed by one large prime mover which supplied power to the main lineshafts from which it was transmitted to the various machines by means of shafts, ropes and belts.

Thus it is seen that the production of power has grown up with

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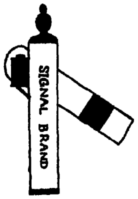

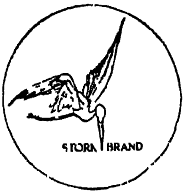

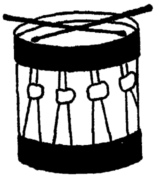

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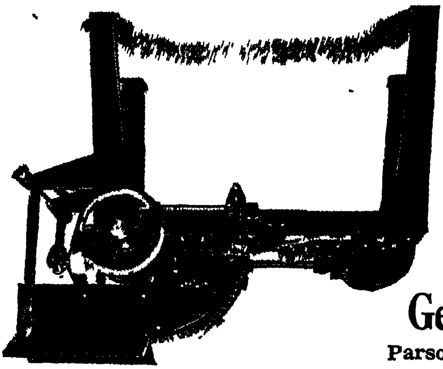

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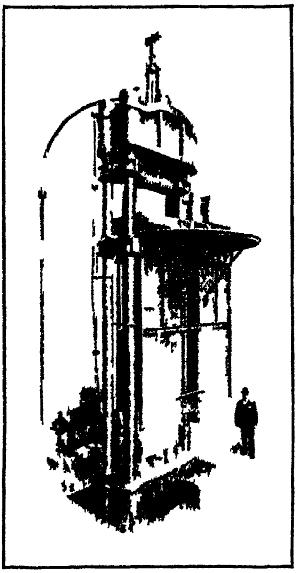

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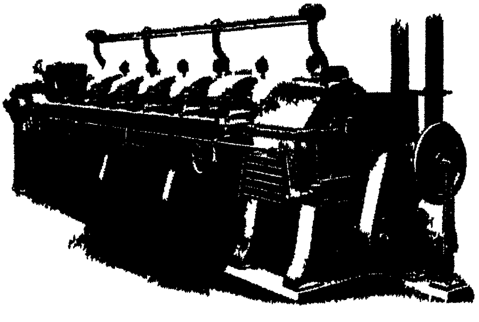

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the mill, with the result that at each mill two entirely different operations are being carried out

(1) The manufacture of yarn or cloth

(2) The production of power

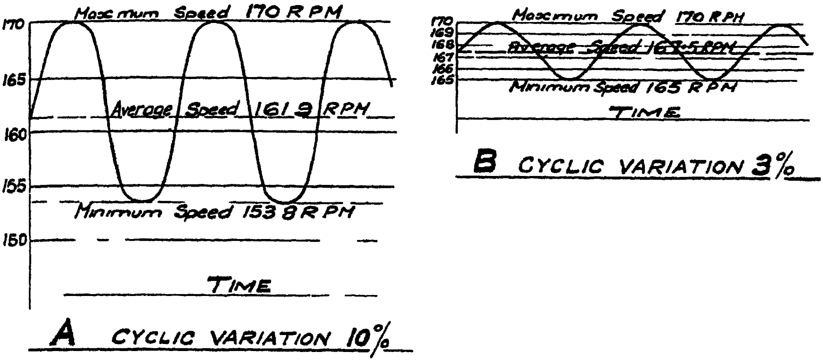

FIG 5 THE EFFECT OF CYCLIC VARIATION OF SPEED

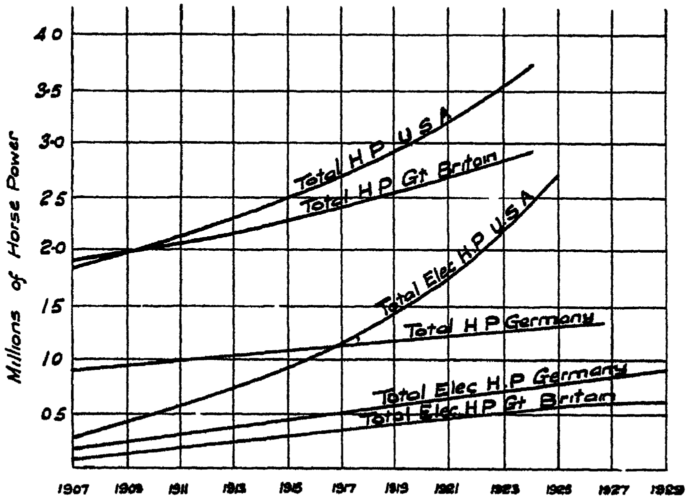

FIG 6 POWER IN TEXTILE INDUSTRY

Now, from the economic point of view, there is no more reason why the cotton spinning and manufacturing industry should produce its own power at the mill than it should make its own bobbins or shuttles, and as the management of a textile factory are specialists in their particular trade, i e , the manufacture of yarn or cloth, they obviously cannot be specialists in another and entirely different trade such as the production of power

Therefore, it must be apparent that to get the very best economy inside the mill, it is necessary to separate the power production from the mill itself in cases where only power is required for manufacturing operations, or where only a small amount of heat energy in the form of process steam is required, such as, for instance, in a cotton-spinning, weaving shed, or a spinning and manufacturing mill.

The above, of course, was not possible as long as there was no means of transporting or transmitting and distributing the power, and this only became possible by the development of electrical engineering, which enables power to be generated in large quantities at a central point in the most efficient way and transmitted economically to the place where it can be used effectively.

It is to be regretted that these economic facts have not been appreciated to the same extent by the Lancashire cotton industry as by our competitors abroad, due no doubt, to our traditional superiority in manufacturing methods which naturally induced a certain amount of self-satisfaction with our methods which frequently hindered us from realizing the rapid progress other competing nations were making in the use and application of electric power in the textile industries.

The census of industrial production for Great Britain, the United States and Germany provides some interesting data, which clearly shows how we are lagging behind in the use of electric power; for instance, in 1907 the British textile industry had installed 1.8 million horse-power, of which 0.11 million was electrical.

The corresponding figures for the United States were 1.6 million horse-power with 0.39 million horse-power electrical, and for Germany 0.91 million horse-power with 0.1 million horse-power electrical.

Fig. 6 shows the rapid growth of the industry which indicates that the present power consumption in the United States is 3.9 million horse-power, of which 2.7 million horse-power is electrical.

In Germany the consumption is 1.2 million horse-power, of which 0.7 million horse-power is electrical, and in Great Britain 2.8 million horse-power, of which 0.54 million horse-power is electrical.

This rapid increase in the use of electric power in the textile trades is taking place in all other countries, such as India, China, Japan, Italy, South America and Russia. This can be verified by any textile machinery maker, as the majority of the machinery shipped abroad is made for motor drive.

The time has now come for the Lancashire mill owner to face the facts and realize that there is something in electrical drive, as it is utterly impossible to believe that the mill owners in other countries are installing electric drive for no economic reason whatever. Records are available from a large number of installations showing that with electric drive increased production ranging from 1 per cent. to as high as 7 per cent., also a better quality product, has been obtained. An average of 3 per cent. to 4 per cent can be obtained on any mill changing over from steam to electric drive.

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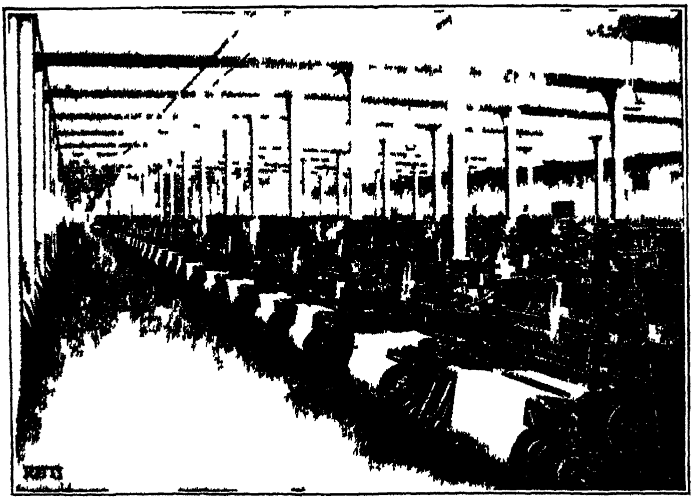

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Oil-treated *v.* Untreated Carded Cotton.

The following is an account of a series of tests conducted to compare oil-treated with untreated cotton The purpose of these tests was to compare the running qualities, waste (visible and invisible), cleanliness of the rooms and machines, end breakage on the roving frames, spinning frames and spoolers, breaking strength and counts of yarn The work was carried through two weeks of regular mill operation at the Erwin Cotton Mills, Cooleemee, N C, and twenty bales of cotton ⅞ in to 1 in middling grade were used

The type of oil used was Minerol Bretol " E " from Borne, Scrymser Co, 17, Battery Place, New York This was applied with the high-pressure system into the conveyor pipe on leaving the upstroke cleaner The amount put on was 0 3 of 1 per cent figured on the amount of cotton going through This will figure to approximately 5 ozs of oil to every 100 lbs of cotton going through

Two comparative tests consisting of two lots each were run, one test being on raw white stock, and the other on coloured One lot of cotton from each test was treated with oil on leaving the upstroke cleaner Each set of figures must be treated separately, since there is no comparison between the figures compiled on the white and on the coloured stocks Each lot contained about 2,200 lbs, and four lots were used

Each lot was run through the same cleaning machinery, because it would give a more accurate test on cleaning On reaching the card room the two tests were run separately, and each lot in the two tests was run on parallel lines of machines The machines used were bale breaker, vertical opener, upstroke cleaner, breaker, intermediate and finisher pickers, cards, one process roving frame, spinning frame, and spoolers The white stock was spun into 21's yarn and the coloured stock into 10's yarn

With white cotton there was 5 16 per cent invisible waste for the unoiled stock and 3 62 per cent for the oiled This gives 1 54 per cent loss in the unoiled stock over the oiled Figured on the amount fed (2,200 lbs), this would give about 30 lbs

With the coloured cotton the results showed that the unoiled coloured cotton had a 3 24 per cent invisible waste, and the oiled had a waste of 2 65 per cent, which is about 11 lbs saved over the unoiled cotton

TABLE I ENDS DOWN OF OILED AND UNOILED COTTON

White Stock No 21's

	Unoiled	Oiled
Slubbers (2 days' run)	9 000	1 000
Intermediates (ends per 100 spindles per hour)	0 326	0 262
Spinning frames	3 140	2 360
Spoolers	94 850	70 850

Coloured Stock No 10's

	Unoiled	Oiled
Slubbers (2 days' run)	4·00	0·00
Intermediates (ends per 100 spindles per hour)	0·41	0·13
Spinning frames	1·14	0·96
Spoolers	73·02	67·80

TABLE II. STRENGTH AND SIZE OF YARNS

White

	Actual		Corrected	
	Plain	Oiled	Plain	Oiled
Average breaking strength	79·6	81·3	79·6	80·6
Average counts	20·74	20·57	20·74	20·74

Coloured

	Actual		Corrected	
	Plain	Oiled	Plain	Oiled
Average breaking strength	170·2	170·8	168·6	170·8
Average counts	9·75	9·84	9·84	9·84

As regards running qualities no difference could be seen in the opening card rooms or drawing except that there was more fly and dust from the unoiled cotton.

A. R. Marley, B.S., in "The Textile World."

Effect of Calendering on Thread Count and Strength.

The figures in the accompanying tables are given, not because they necessarily prove anything, but as interesting information on what actually happened to the thread count and to the strength in a series of experiments on light-weight cloths.

In the first table, the grey construction is shown. The weight is given in ounces per square yard, the yarn number as determined by the mill making the cloth, the thread count as actually found in the cloth and the strength as determined by breaking five specimens in each of the warp and filling directions. As the cloth was made for balloon cloth, the War Department specification calling for a 1-in. strip test was used in determining the breaking strength. Three of the grey cloths were finished by putting them through what was known as a regular calender and four through a heavy calender. Only one fabric was put through the regular and heavy. As would be expected, the calendering pulled down the width of the cloth, with the attendant increase in the number of ends per inch and a decrease in the picks per inch. This change in the construction was reflected in most instances in the change in strength. Such inconsistencies as occurred are probably due to the variation in the cloth rather than to the variation in the general effect. Apparently, the finer the yarns and the higher the thread count, the more effect that calendering will have on the count and the strength. These experiments also tend to show that calendering as such has little effect on the combined strength of the warp and filling.

Grey

Sample	Weight oz. per sq. yd.	Yarn No. W	Yarn No. F	Count W	Count F	Strength 1-in. Strip W	Strength 1-in. Strip F
1	2.6	83	83	141	135	45	37
2	2.8	77	77	124	132	44	53
3	2.6	70	70	118	124	40	40
4	2.7	65	65	110	110	42	33
5	2.6	59	59	97	108	35	36
6	2.6	53	53	92	90	42	32
Regular Calender							
1	2.5			148	132	50	39
2	2.8			128	123	50	44
6	2.6			97	84	41	29
Heavy Calender							
3	2.5			123	117	42	33
4	2.7			116	104	45	31
5	2.6			101	103	36	38
6	2.6			96	85	42	30

(*National Association of Cotton Manufacturers, Boston.*)

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The Japanese Cotton Industry.

A difficult situation has arisen in Japan as a result of over-production in the cotton industry.

It will be recalled that most of the Japanese cotton mills increased the number of their spindles to compensate for the decrease in production anticipated as a result of the abolition of night work for women and children, and that the members of the Japanese Cotton Spinners' Association agreed to reduce production by 23 per cent., this reduction to cease as soon as night work was abandoned, and not later than July 1, 1929, when the prohibition of night work came into force.

After the abolition of night work, it was found that there was over-production of cotton yarns, for various reasons. The domestic demand decreased, following the financial retrenchment policy of the Government, which was preparing to remove the gold embargo. Exports to China fell, on account of the sharp decline in the price of silver. At the same time, as a result of the removal of the limitation, there was an enormous increase in the number of spindles. Thus the need for the limitation of production was again felt. The Japanese Cotton Spinners' Association, at its general meeting on January 28, passed a resolution providing that, on the basis of 17 hours of work per day and two holidays per month (which are observed by most mills), the member factories should adopt two additional holidays per month, and furthermore that they should seal 10 per cent. of their total spindles for a period of six months from February 15, 1930. In place of the two additional holidays, members might seal additional spindles, in which case each holiday was to be taken as equivalent to a reduction of 3.6 per cent. in the number of spindles.

According to press reports, some factories have adopted the four holidays per month and sealed 10 per cent. of their spindles, while some have adopted three holidays and sealed 13.6 per cent. of their spindles, but most of the mills have found it more advantageous to retain two holidays and seal 17.2 per cent. of their spindles.

Vigorous opposition to these measures was expressed by the trade unions as well as by the general public, on the ground that the Association had considered their own profits at the expense of the workers and consumers. The Osaka Textile Mill Workers' Union, which is affiliated to the General Federation of Labour, presented a statement to the Association and to the authorities concerned expressing the Union's opposition to the aggravation of the unemployment situation and the lowering of earnings. It was estimated that about 20,000 workers would lose their employment.

NEW POLISH SPINNERS' CARTEL.

Impelled by the chaotic conditions which prevail in the textile industry, another attempt has been made to form a cartel of Polish spinners, writes our Lodz correspondent. The firms that have already joined the new cartel control about 80 per cent. of all the spindles in the Lodz district, and efforts are being made to force in the other spinners who have so far remained outside the trust. The first move of the cartel has been to call upon the members to operate only one shift for six days per week. This is equivalent to a working week of 46 hours. Up to this time operations in the Lodz mills have been on a very irregular basis, some spinners working two, three, or four days per week on two shifts, while others have been working four, five, or six days on only one shift. The cartel managers have figured out that if all spindles operate not more than 46 hours per week even the present low rate of production will be curtailed by about 12 per cent. This further reduction of 12 per cent. in yarn output, it is calculated, will about bring production into line with existing demand. Stocks of goods are still abnormally high, but, if production can be held down for a few months, it is hoped that the buying power of the agricultural community will soon begin to pick up so that the surplus stocks can be gradually worked off. In the meantime, unfortunately, the weak financial condition of many of the mill owners (two more serious failures have been reported during the past week or two) deters them from adopting the cartel's restriction programme. In fact, they take advantage of it to increase their own production. It is the cut-throat competition of these mill owners that has so far defeated all attempts to organize the Lodz industry on a rational basis. (*The Commercial.*)

WAGES IN U.S. COTTON MILLS AND IN CENTRAL EUROPE.

The National Association of Cotton Manufacturers, Boston, publish the following in their Bulletin:—

The accompanying table showing wages in several of the European countries compared to the United States is of particular interest, as it shows the wage rate per hour for a great many of the individual operations. It also explains why imports from Czecho-Slovakia continued to increase rapidly, in spite of the present tariff.

These figures, naturally, do not give sufficient information on which to compare production costs. Except in the case of weavers, the size of the job is not known. For example, in Switzerland, although a ring spinner may be getting 12 cents an hour, it may be for tending 500 spindles on Indian cotton, where the breakage is so high that an assistant is provided, even on such a small number of spindles.

This table does, however, give a very good idea of the wages received by the operatives. As the United States is the last civilized country to operate more than 48 hours per week, the weekly wages can be figured on a basis of 48 hours.

In transposing the figures from the foreign monetary systems into the equivalent of United States currency, the present rate of exchange has been used.

Position	Switzerland	Germany	Austria	Czecho-Slovakia	United States
	$	$	$	$	$
Opening	.140	.1575	.0980	.1080	—
Picker Tender ...	.140	.1575	.1064	.1080	.2820
Card Tender ...	.150	.1550	.0910	.0750	.3140
Card Stripper ...	.160	.1550	.1064	.0900	.3140
Card Grinder ...	.170	.2375	.1148	.1200	.4070
Drawing Tender ...	.130	.1250	.0980	.0900	.2770
Sweeper	.110	.0875	.0840	.0600	—
Speeder Tender ...	.160	.1250	.0980	.0900	.3520
Doffer	—	.0900	.0700	.1020	.3180
Spinner—Ring ...	.120	.1375	.1400	.0840	.3075
Spinner—Mule ...	.230	—	—	.1530	.6270
Weaver (4 looms)*	.160	.1538	.1120	.0960	.3815
Loom Fixer ...	.350	.3850	.2520	.1890	.4820
Slasher Tender ...	.230	.1825	.1330	.2040	.3960
Twister Tender ...	.152	—	.0910	.0747	—
Spooler Tender ...	.080	.1350	.1204	.0900	.2335
Warper Tender ...	.120	.1600	.1400	.0900	.3305
Cloth Inspector ...	.150	.1350	.1400	—	.2595
Average ...	.162	.1612	.1173	.1073	.3521

* For foreign countries only.

WORKING HOURS IN U.S. COTTON MILLS.

According to advices received in Manchester from U.S.A., there is a movement in the cotton industry to reduce working hours per week, to a maximum of 55 for the day shift, and 50 for the night shift. This movement is sponsored by the Cotton Textile Institute, who issue the following statement on this subject: —

> " In conferences conducted by Walker D. Hines, Chairman, and George A. Sloan, President of the Cotton Textile Institute, New York, an important number of cotton manufacturers in Southern and New England States have been considering for some time ways and means for diminishing the present degree of irregular employment in the industry, and as a result a recommendation has been made by these mill executives to promote that object. The recommendation contemplates a voluntary adjustment on the part of mills generally so that the day shift shall not exceed 55 hours per week and the night shift shall not exceed 50 hours per week.
>
> The effect of these schedules in those sections where night running is general will be to reduce the length of the regular night shift by not less than five hours per week in most cases and in some cases by 10 hours per week. In addition, both on night and day shifts, extra running time outside of the regular shifts will be eliminated and in the comparatively few

cases where the day shift now exceeds 55 hours there will be a reduction to not more than 55 hours.

For some years past the mills have actually been running on a lower total basis of employment than is indicated by these schedules, but under fluctuating methods of operation which have led to much unnecessary irregularity of employment and discontent on the part of employees. The proposed plan will tend to secure a greater regularity of employment. Mill executives recommending this plan to the industry represent some of the most important mill interests in the United States.

In the opinion of leading mill executives who have given the matter considerable thought and study it is believed that the policy recommended is a sound one for the cotton textile industry to follow in that it will promote greater regularity of work, the shortening of hours in the manner indicated, and greater contentment among mill employees."

The mills represented in the foregoing list include many of the largest and most successful in the U.S.A. Their action is extremely important and will inevitably have a strong influence upon the entire cotton manufacturing industry of the country.

Eight-Loom System.

Statement by the Committee of the Burnley Master Cotton Spinners and Manufacturers' Association.

In November, 1928, the Committee of the Burnley Master Cotton Spinners and Manufacturers' Association appointed a sub-committee of four persons to enquire fully into the question of the best method to adopt in order to reduce the cost of production, without reducing wages or lengthening working hours. The sub-committee turned its attention to automatic looms and automatic attachments to looms, and either the whole or part of the sub-committee visited works where automatic looms were being made and mills in which these looms were being worked. The automatic looms examined were the "Vickers Stafford," the "Northrop" and the "Toyoda"; the attachments examined were the "Whittaker," the "Terry," and the "Valentin." Members have on two occasions visited the Continent to examine looms and to study working conditions in Holland and Germany.

Whilst realizing that automatic looms or attachments would sooner or later be necessary in order to compete successfully with foreign countries on certain types of cloth, it was felt that as the expense of making these changes was very heavy, it might be difficult to effect much saving on automatic looms if single shifts only were worked, and it was well known that the operatives had a very strong objection to working double shifts, such as many of our competitors abroad are doing. The interest on capital and depreciation of machinery resulting from the installation of automatic looms would be so large as practically to swallow up the saving in cost of weaving on a single-shift system.

The question of running more than the customary four looms per weaver was also fully discussed, and, given certain conditions, such as reducing the speed of the looms, using larger cops, taking away from the weaver all extraneous duties such as sweeping, cleaning, oiling, pulling cuts off, and weft and cloth carrying, the sub-committee were of opinion that this system could be adopted without increasing the work of the weaver, and that it would enable the employer to produce cloth more cheaply and also permit of the payment of a higher weekly wage to the operative. The saving in cost of production was expected to be sufficient to enable more trade to be obtained, and ultimately to enable mills that were then stopped to be restarted. Very little capital expense would be incurred, and the loss of time which must take place before either automatic looms or attachments could be installed and effectively worked would be avoided.

At the end of November, 1928, the employers' sub-committee met the committee of the Burnley Weavers' Association to discuss the various suggestions which they had considered. The condition of trade generally was

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also discussed, and it was pointed out that already manufacturers owning from 15,000 to 16,000 looms in the Burnley district had ceased to carry on business, either retiring voluntarily or by reason of failures. The question of automatic looms and attachments was discussed, and also the time that must elapse before these could be installed, assuming the necessary capital could be secured. As a temporary measure the running of eight looms per weaver was advocated by the employers, the percentage of looms to be worked on such systems to be agreed upon between the two parties. It was pointed out to the operatives' representatives that the employers were not desirous of reducing wages, and were not trying to get an increase in working hours, but unless something was done to reduce the costs of production many other firms would be forced to close down, and gradually the number of weavers in employment would further be reduced.

Subsequently the operatives asked that members of their Central Association and members of their local Association should together meet the employers to discuss the matters introduced by the employers, and this was agreed to, and further negotiations were carried on. After numerous discussions by the two sub-committees as to wages and conditions to be attached to the running of eight looms per weaver, and also meetings with the full committee of the Amalgamated Weavers' Association, it was finally agreed towards the end of April, 1929, that about a dozen firms should experiment on the system of eight looms per weaver, to the extent of 4 per cent. of their looms, and that for a period of three months a fixed wage of 50s. per week should be paid to the weavers, and that during this time an attempt should be made to arrange a list price, based on production, as early as possible.

Throughout the discussions it was understood that the experimental period during which 4 per cent. of looms of certain mills should be on the system of eight looms per weaver should expire on March 31, 1930, and it has therefore not been possible until after that date to publish any information as to the result of these experiments. After the wages dispute in July and August last the wages of the weavers on the eight looms were reduced by 6·4 per cent., making 46s. 10d. per week. The operatives objected to this reduction, but the employers pointed out that the three months' arrangement as to wages had expired, and that, under the terms of the award on wages in the cotton trade, the wages of all weavers were automatically decreased by 6·4 per cent.

In December last, the employers offered to make up the wages from 46s. 10d. to 50s. from the date of the reduction, if a piece price list could be arranged for the remainder of the experimental time to March 31, 1930, but no agreement for a piece price list could be arranged.

It should here be stated that the average wage of a Burnley weaver engaged on four looms weaving plain cloth is about 40s. per week.

The employers offered a wage of 16·7 pence for 100,000 picks woven, based on a loom running 185 picks per minute, with an efficiency of 85 per cent., which would give a wage of 50s. per week on eight looms. If looms ran slower than 185 picks per minute the basis price was to be increased accordingly, but if the speed was increased beyond 185 picks per minute, the basis to remain at 16·7 pence, so that the weavers would then be able to earn more than 50s. per week. In addition, it was felt that the efficiency would be more than 85 per cent., and therefore over 50s. per week could be earned by efficient weavers.

As regards cloths other than strictly plain cloths, the payment on a pick basis only would enable these cloths to be sold at a lower price than at present obtains, as some of the additions on the uniform list have resulted in making the cost of weaving so high that our foreign competitors take all the trade in this class of goods which they are able to make, leaving us with only the surplus. This surplus is rapidly decreasing, as more and more looms are being worked abroad.

The operatives asked for a basis to enable a weaver to earn 60s. per week on plain cloth, with additions in accordance with the clauses in the uniform list, but later they reduced this to 56s. per week with uniform list additions. Their offer was coupled with a demand for a fall-back wage of 52s. 4d. per week for eight running looms, and also for large cops to be provided in all cases.

Subsequently this was amended by an offer to accept a piece price list rate of 45 per cent. over the uniform list, instead of the 82½ per cent. which now obtains, with uniform list additions, calculated to give a weekly wage of 56s.

A condition of the experiment was that weavers should be relieved of the duties of sweeping and cleaning looms, oiling, weft and cut carrying. Some of the firms have been using large cops, thus reducing the amount of shuttle changing. All the firms have reduced the speed of their looms, generally to about 185 picks per minute, but in some cases the speed has been reduced below this figure, and in others the speed is more than 185 picks per minute; in one case reaching 195 picks per minute.

It has been found that the running of eight looms at the reduced speed, along with the other advantages, entails no more work to the weaver than the running of four ordinary looms under present conditions.

It was agreed that the weavers' representatives should be granted every facility for visiting at any time the various mills conducting the experiment, and examining the conditions of weaving. This has been taken full advantage of and the representatives of the weavers have frankly admitted that the experiment has been a practical success.

Most of our members desire to try the scheme at their mills, and many of them have made application to do so, but we have discouraged any extension, and they have refrained from doing so until the expiry of the experimental period.

The Burnley employers did not intend to run 100 per cent. of their looms at eight looms per weaver, but wish to try a certain agreed percentage at each firm where the scheme could successfully be carried out. The employers are fully aware that at some of the mills it could not be done, owing to the class of cloths woven.

Whilst admitting that the scheme has been proved a success in certain cases, the operatives' representatives appear to be afraid of the number of weavers who would be thrown out of employment by its general adoption. From the employers' point of view, unless something is done very quickly to bring about an improvement in the trade, more mills will close and more weavers will be thrown out of employment than would be the case if the eight-loom system were in operation.

The payment of a wage of about 7s. per loom, as suggested by the operatives, would result in such a small saving in the cost of weaving as not to make the change from the old system of running worth putting into operation.

The conduct of these experiments and of the negotiations between the employers' and operatives' representatives has been, as will be seen by the foregoing statement, prolonged and patiently carried out. There has been no desire on the part of the employers to reach hurried conclusions or to take precipitate action. The position at the last meeting between the Burnley Employers' Committee and the representatives of the Amalgamated Weavers' Association was that the weavers persisted in their demand for a price to be paid to the operatives who should be engaged on this system which, in the opinion of the employers, went so far to nullify the savings effected as to render it not worth adoption. They also stated that even if the employers were to agree to these rates of pay and the conditions suggested, they were not confident that the Central Council of their Amalgamation would agree to them, or even agree to a continuance of the experiment at all.

Following this meeting the Central Council of the Amalgamated Weavers' Association met on Saturday, March 29th, at which a resolution was adopted instructing their Executive Committee, so far as they were concerned, to bring the experiment to an end. The matter then, in accordance with the joint rules, came up for discussion between the Central Committee of the Cotton Spinners and Manufacturers' Association and the Committee of the Amalgamated Weavers' Association, and at a joint meeting held on Tuesday last, April 8, 1930, the application of the weavers that the experiment should be discontinued was discussed at very considerable length, without any progress being made.

At this meeting the employers asked the operatives if they were willing to consider a suggestion that the experiment should be continued upon an extended basis, and for a further limited period of time; that the experiment should not be confined to the Burnley district, but should be open to adoption by any district within the Employers' Association where it was practicable to do so, without restriction as to which firms should adopt it. The operatives' representatives after retiring to consider what had been said by the employers, and the suggestion that had been made, upon their return to the meeting reiterated their demand and said that in view of the instructions given by their General Council they could not depart from their application.

In reply, the employers stated :--

> " We very much regret having received an application of the character contained in your letter that the Burnley eight-loom experiment shall now formally come to an end, and to note your attitude upon it at this joint meeting. We cannot recommend the Burnley Employers' Association to discontinue the experiment."

The employers view with grave concern the attitude of mind of the operatives' organization towards this attempt to bring about a cheapening of production, which has been proved to be technically practicable and economically successful in its application. They feel that the operatives are standing in the way of any progress calculated to render the industry more efficient and more capable of effective competition abroad. They also feel that the operatives have unduly exaggerated the effects upon employment which a controlled extension of the system would have. The employers all along have realized that in the interests of the industry as a whole, and for the well-being of both operatives and employers, it was desirable that the extension of this development should be regulated and controlled by the joint action of both bodies working harmoniously together. They have not, and never have had, any desire that this system should be applied upon a wide unlimited scale. They realize that it must proceed cautiously, and only at such a rate as the industry can adapt itself to without bringing into being countervailing objections that might undo the trade improvement, it was hoped to achieve to the industry. They recognize that any temporary displacement of labour which the system involves must be kept within reasonable limits, and that the suspension of any operatives not required should be effected by a process of selection made in such a way as to involve the minimum of hardship to those affected. The employers have wished, in introducing this system, to pay higher wages to the operatives engaged upon it than could be earned under the present four-loom system. They have not suggested that, coupled with it, there should be any extension of the working hours. The reduction in output brought about by the reduction in speed would automatically provide some further employment and the ability to produce at a cheaper price should also bring an increased volume of trade and create some further employment for those weavers unemployed, or, at any rate, do something to arrest the constantly growing number of idle looms, with consequent unemployment of work-people.

It has been demonstrated beyond all doubt that the adoption of the eight-loom system will reduce materially the cost of weaving cotton cloth, and will also permit of the payment of an increased wage to the operative.

The trade situation is one which neither employers nor operatives can regard with complacence. The number of idle looms is constantly increasing with its reflection upon the unemployment figures. It is not a choice for the operatives of agreeing to the extension of a system that, whilst temporarily causing some workers to be unemployed at the outset, may ultimately improve general conditions or of maintaining the *status quo*. There is no justification from the present condition of trade for the conclusion that the *status quo* can be maintained simply by retaining present conditions. On the contrary, there is evidence that conditions may possibly be worse, in which case the growth of unemployment is inevitable.

There will be a further meeting on this question between the Central Committee of the Cotton Spinners and Manufacturers' Association and the Northern Counties Textile Trades' Federation, before either side is at liberty to take such further action as they may deem advisable. The employers are hopeful that as an outcome of this meeting a settlement will be reached, and agreement come to whereby the system may be extended and, at the same time, jointly controlled. The operatives should realize that the experience gained during the last twelve months cannot be wiped out or ignored. Widespread interest is being taken throughout the county in this question, and a refusal to continue in co-operation with the employers' organization to agree jointly to control an extension of the system may lead to uncontrolled, unregulated adoptions all over the county, with undesirable results.

It is very regrettable that in these extremely difficult times obstacles should be placed in the way of necessary and well-intentioned efforts, designed for the preservation of the cotton industry, upon which the livelihood and well-being of large numbers of our industrial population depends.

Burnley, *April* 11, 1930.

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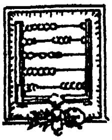
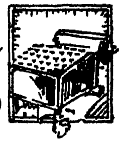


INTERNATIONAL COTTON STATISTICS



The present tabulation is the final result of the census of cotton consumption in the cotton-spinning mills of the world for the half-year ended January 31, 1930, and of cotton mill stocks on that day. It should be borne in mind that the figures published herewith relate to raw cotton only, and do not contain linters or waste cotton of any kind whatsoever.

The total world's cotton mill consumption for the half-year ended January 31, 1930, compared with the same period of the previous year, is as follows:—

	31st Jan 1930 bales	31st Jan. 1929 bales	Increase or Decrease over previous year bales
American Cotton	7,083,000	*7,613,000*	− 530,000
East Indian Cotton	2,985,000	*2,574,000*	+ 411,000
Egyptian Cotton	502,000	497,000	+ 5,000
Sundries	2,632,000	*2,184,000*	+ 448,000
All kinds of Cotton	13,202,000	*12,868,000*	+ 334,000

The total world's cotton mill stocks on January 31, 1930, were:—

American Cotton:

Europe	703,000	bales *against*	_783,000_	_bales on 31st Jan , 1929._
Asia	219,000	„ „	_319,000*_	„ „ „
America	1,811,000	„ „	_1,802,000_	„ „ „

The total world's mill stocks of American cotton on January 31, 1930, were 2,742,000 bales, as against 2,958,000 bales in the year 1929.

East Indian Cotton:

Europe	300,000	bales *against*	_248,000_	_bales on 31st Jan , 1929._
Asia	851,000	„ „	_948,000*_	„ „ „ „

Altogether the world's mill stocks of East Indian cotton are 1,173,000 bales against 1,216,000 12 months ago.

Egyptian Cotton:

Europe	152,000	bales *against*	_136,000_	_bales on 31st Jan., 1929._
Asia	17,000	„ „	10,000*	„ „ „
America	49,000	„ „	_32,000_	„ „ „ „

The total world's mill stocks of Egyptian cotton are 224,000 bales against 182,000 bales twelve months ago.

* *See footnote to Japan on page 544.*

Sundry Cottons :

Europe	363,000 bales	*against*	*439,000 bales on 31st Jan., 1929.*
Asia	298,000 „	„	*307,000 „ „ „ „*
America	93,000 „	„	*122,000 „ „ „ „*

The total world's mill stocks of all kinds of cotton on January 31, 1930, were 4,931,000 bales against 5,294,000 bales on January 31, 1929.

N. S. PEARSE,
Assistant to the General Secretary.

SHORT-TIME TABLE.

The spindle-hours stopped by the mills reporting, when worked out over the whole industry of each country, indicate the following stoppages in weeks of 48 hours, for the industries in the countries tabulated below :—

	Half-year ending Jan. 31st, 1930
Great Britain	7·092†
Germany	2·356
France	1·368
Russia	2·650
Italy	3·930
Czecho-Slovakia 10 per cent. of possible spindle hours	
Belgium	1·320
Poland	1·426
Switzerland	2·903
Holland	0·047
Austria	8·191
Sweden	1·919
Portugal	0·067
Finland	2·993
Denmark	0·845
Norway	4·406
Japan	3·091
China	2·130
Canada	4·735
Mexico	2·692
Brazil	4·233

† The stoppage of the American Section amounted to 9·007 weeks, and that of the Egyptian Section to 4·555 weeks of 48 hours. There were 88 mills with 4,840,100 spindles in the American Section completely stopped during the period under review.

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	COUNTRIES	IN THOUSANDS OF ACTUAL BALES (regardless of weight)							
		AMERICAN				EAST INDIAN			
		Half year ending				Half year ending			
		Jan. 31 1930	July 31 1929.	Jan 31 1929	Jan 31 1928	Jan. 31 1930	July 31 1929	Jan. 31 1929	Jan 31 1928
	EUROPE :—								
(*1*)	Great Britain	880	939	971	1,027	100	91	92	47
(*2*)	Germany.. ..	468	474	550	677	144	130	122	95
(*3*)	France	380	405	419	407	100	112	105	78
(*4*)	Russia	231	73	317	376	52	—	—	—
(*5*)	Italy	355	373	372	342	133	114	111	81
(*6*)	Czecho-Slovakia	171	181	196	237	56	49	41	39
(*7*)	Belgium	93	99	120	113	89	85	90	64
(*8*)	Spain	130	135	156	151	46	37	37	34
(*9*)	Poland	98	87	123	173	12	9	14	12
(*10*)	Switzerland ..	24	26	27	28	5	5	4	3
(*11*)	Holland	76	75	76	74	22	19	18	16
(*12*)	Austria	39	51	52	64	20	19	21	18
(*13*)	Sweden	48	45	49	52	1	1	1	—
(*14*)	Portugal ..	28	35	21	34	—		1	2
(*15*)	Finland .. .	16	16	18	21		—	—	—
(*16*)	Hungary* .	19	15	—	—	5	5	—	—
(*17*)	Denmark ..	10	11	10	11	—		—	—
(*18*)	Norway	5	4	3	4	—	—	—	—
	Europe Total ..	3,071	3,044	3,480	3,791	785	676	657	489
	ASIA :								
(*1*)	India	25	25	27	117	1,087	958	922	1,000
(*2*)	Japan	573	578	522	572	870	751	737	676
(*3*)	China	130	158	121	151	199	180	218	108
	Asia Total ..	728	761	670	840	2,156	1,889	1,877	1,784
	AMERICA :								
(*1*)	U.S.A.	3,157	3,483	3,305	3,465	31	25	10	15
(*2*)	Canada	93	115	103	94	—		—	—
(*3*)	Mexico	—	—	—	—				—
(*4*)	Brazil	—		—	—				—
	America Total ..	3,250	3,598	3,408	3,559	31	25	10	15
	Sundries	34	60	55	36	13	14	30	15
	HALF-YEAR'S TOTAL ..	7,083	7,463	7,613	8,226	2,985	2,604	2,574	2,303

* Formerly included in Sundries.

SUMPTION for the Half-year ending 31st January, 1930, returns made to the International Cotton Federation.

IN THOUSANDS OF ACTUAL BALES
(regardless of weight)

EGYPTIAN				SUNDRIES				TOTAL				
Half year ending				Half year ending				Half year ending				
Jan. 31 1930	July 31 1929	Jan. 31 1929	Jan 31 1928	Jan. 31 1930	July 31 1929	Jan 31 1929	Jan 31 1928	Jan. 31 1930	July 31 1929	Jan. 31 1929	Jan 31 1928	
167	174	191	172	268	156	186	275	1,415	1,360	1,440	1,521	*(1)*
38	34	36	34	26	16	16	18	676	654	724	824	*(2)*
65	59	47	49	44	38	42	41	589	614	613	575	*(3)*
27	23	36	37	816	998	705	466	1,126	1,094	1,058	879	*(4)*
30	28	25	24	15	9	10	8	553	524	518	455	*(5)*
11	12	12	16	6	2	2	2	244	244	251	294	*(6)*
4	3	2	2	53	20	33	21	239	207	245	200	*(7)*
14	12	12	11	18	9	6	9	208	193	211	205	*(8)*
4	7	8	7	4	2	1	3	118	105	146	195	*(9)*
21	20	21	24	2	1	1	3	52	52	53	58	*(10)*
—	—	—	—	5	2	—	1	103	96	94	91	*(11)*
2	2	2	2	2	1	1	1	63	73	76	85	*(12)*
1	—	—	1	—	—	1	2	50	46	51	55	*(13)*
—	—			20	20	10	16	48	55	32	52	*(14)*
—			—	—	—		—	16	16	18	21	*(15)*
—	—	—	—	1	1	—	—	24	20	—	—	*(16)*
—	—	—		—		—	—	11	12	10	11	*(17)*
—		—	—	—		—	—	5	4	3	4	*(18)*
384	374	392	379	1,280	1,275	1,014	866	5,520	5,369	5,543	5,525	
4	2	1	2	48	33	29	29	1,164	1,018	979	1,148	*(1)*
22	21	19	19	79	75	63	55	1,544	1,425	1,341	1,322	*(2)*
1	—	—	1	763	675	605	509	1,093	1,013	944	769	*(3)*
27	23	20	22	890	783	697	593	3,801	3,456	3,264	3,239	
76	80	75	80	25	27	28	30	3,289	3,615	3,418	3,590	*(1)*
7	7	3	1	—	—		—	100	122	106	95	*(2)*
—	—	—	—	126	81	83	102	126	81	83	102	*(3)*
—			—	234	221	251	295	234	221	251	295	*(4)*
83	87	78	81	385	329	362	427	3,749	4,039	3,858	4,082	
8	8	7	7	77	68	111	83	132	150	203	141	
502	492	497	489	2,682	2,455	2,184	1,969	13,202	13,014	12,868	12,987	

Estimated TOTAL WORLD'S COTTON MILL STOCKS comparison on basis of Spinners' returns

IN THOUSANDS OF ACTUAL BALES (regardless of weight)

COUNTRIES	AMERICAN Half-year ending				EAST INDIAN Half-year ending			
	Jan. 31 1930	July 31 1929	Jan. 31 1929	Jan 31 1928	Jan. 31 1930	July 31 1929	Jan 31 1929	Jan 31 1928
Europe:								
(1) Great Britain	**77**	71	91	99	**24**	24	16	11
(2) Germany	**101**	108	140	185	**47**	55	43	31
(3) France	**143**	167	154	153	**64**	87	60	32
(4) Russia	—	45	12	16	—	—	—	—
(5) Italy	**161**	132	148	129	**68**	65	19	33
(6) Czecho-Slovakia .	**39**	43	54	61	**16**	17	13	11
(7) Belgium	**39**	41	32	43	**49**	55	38	29
(8) Spain	**22**	20	25	32	**7**	9	8	5
(9) Poland	**15**	11	24	19	**8**	3	2	3
(10) Switzerland .	**18**	14	20	21	**4**	5	3	2
(11) Holland .. .	**37**	30	35	34	**11**	15	9	5
(12) Austria . ..	**10**	12	14	16	**4**	5	6	4
(13) Sweden .. .	**17**	19	19	21	**1**	1	1	—
(14) Portugal . ..	**6**	4	5	6			—	—
(15) Finland	**6**	6	6	5			—	—
(16) Hungary* ..	**5**	3		–	**2**	1	–	—
(17) Denmark ..	**5**	3	3	4	–			—
(18) Norway	**2**	1	1	1	—	—	—	—
Europe Total ..	**703**	730	783	845	**300**	342	248	166
Asia:								
(1) India	**10**	27	41	23	**612**	866	667	531
(2) Japan†	**164**	311	267	260	**188**	424	241	233
(3) China	**45**	52	41	48	**51**	105	40	25
Asia Total ..	**219**	390	349	331	**851**	1,395	918	789
America:								
(1) U.S.A.	**1,735**	932	1,698	1,624	**18**	14	9	6
(2) Canada	**79**	63	104	54	—	-	—	—
(3) Mexico	-	—	—	—	—	–	—	—
(4) Brazil	—	—	—	—	—	—	—	—
America Total ..	**1,814**	995	1,802	1,678	**18**	14	9	6
Sundries	**6**	14	24	13	**4**	10	11	8
HALF-YEAR'S TOTAL ..	**2,742**	2,129	2,958	2,867	**1,173**	1,761	1,216	969

*Formerly included in Sundries.

† Including Spinners' Port Warehouse Stocks, prior to 1930 Spinners' Port Warehouse Stocks on July 31st, 1929, were, viz, 76,547 bales American, 111,602 bales Indian, 2,391 bales Egyptian, and 9,841 bales Sundries; Jan. 31st, 1930, American, 28,335; Indian, 25,400; Egyptian, 434; Sundries, 8,618.

on 1st March, 1930, with previous figures for made to the International Cotton Federation

IN THOUSANDS OF ACTUAL BALES
(regardless of weight)

EGYPTIAN				SUNDRIES				TOTAL				
Half-year ending				Half-year ending				Half-year ending				
Jan. 31 1930	July 31 1929	Jan 31 1929	Jan 31 1928	Jan 31 1930	July 31 1929	Jan 31 1929	Jan 31 1928	Jan. 31 1930	July 31 1929	Jan 31 1929	Jan 31 1928	
47	41	46	36	88	41	56	69	236	177	209	215	(1)
15	13	13	15	6	7	6	6	169	183	202	237	(2)
38	35	27	18	31	31	30	21	276	320	271	224	(3)
4	9	7	10	200	190	321	287	204	244	340	313	(4)
13	15	13	9	6	5	5	5	248	217	215	176	(5)
5	5	5	4	3	1	1	1	63	66	73	77	(6)
2	2	2	1	15	14	11	13	105	112	83	86	(7)
7	6	4	5	4	3	2	2	40	38	39	41	(8)
2	2	2	1	1	1	—	1	21	17	28	24	(9)
18	14	16	17	1	2	1	2	41	35	40	42	(10)
—	—			2	1		1	50	46	44	40	(11)
1	1	1			1	1	1	15	19	22	21	(12)
—						1	1	18	20	21	22	(13)
—	—			6	2	4	2	12	6	9	8	(14)
—								6	6	6	5	(15)
—	—			—		—	—	7	4	—	—	(16)
—		—			—	—	—	5	3	3	4	(17)
—	—	—	—	—	—	—	—	2	1	1	1	(18)
152	143	136	116	363	290	439	412	1,518	1,514	1,606	1,539	
3	4	1	1	24	39	14	11	649	936	723	566	(1)
12	14	9	23	27	34	35	81	391	783	552	597	(2)
2	1	—	—	247	168	258	183	345	326	339	256	(3)
17	19	10	24	298	241	307	275	1,385	2,045	1,611	1,419	
46	60	30	39	12	19	19	21	1,811	1,025	1,756	1,690	(1)
3	2	2	1	—	—	—	—	82	65	106	55	(2)
—	—	—	1	42	36	36	39	42	36	36	40	(3)
—	—	—	—	39	90	67	78	39	90	67	78	(4)
49	62	32	41	93	145	122	138	1,974	1,216	1,965	1,863	
6	4	4	2	38	60	70	38	54	88	109	61	
224	228	182	183	792	745	938	863	4,931	4,863	5,294	4,882	

ESTIMATED TOTAL WORLD'S COTTON
years 31st July, 1929, and 31st Jan.,
the International Cotton

COUNTRIES	TOTAL ESTIMATED NUMBER OF SPINNING SPINDLES		MULE SPINDLES	
	Half-year ended		Half-year ended	
	Jan 31, 1930	July 31, 1929	Jan 31, 1930	July 31, 1929
EUROPE:				
Great Britain	56,277	55,917	42,766	42,776
Germany	11,260	11,250	4,630	4,630
France..	9,891	9,880	3,441	3,441
Russia*	7,624	7,465	2,252	2,597
Italy	5,317	5,210	4,703	678
Czecho-Slovakia ..	3,663	3,673	1,676	1,675
Belgium	2,179	2,156	463	451
Spain	1,875	1,875	10	10
Poland	1,494	1,557	403	430
Switzerland	1,454	1,504	636	675
Holland	1,163	1,160	251	251
Austria	908	955	309	353
Sweden	627	626	93	95
Portugal	503	503	173	173
Finland	262	262	45	46
Hungary	176	153	30	29
Denmark	98	99	4	5
Norway	60	60	13	13
Total	104,831	104,305	61,898	58,328
ASIA:				
India	8,807	8,704	871	897
Japan	6,837	6,530	35	42
China	3,699	3,602	—	—
Total	19,343	18,836	906	939
AMERICA:				
U.S.A.‡	34,631	34,829	1,800	1,800
Canada	1,283	1,240	205	200
Mexico	760	751	3	37
Brazil	2,771	2,750	—	3
Total	39,445	39,570	2,008	2,040
Sundries	1,524	1,500	139	200
Grand total ..	165,143	164,211	64,951	61,507

---

*7,200,000 spindles were active; the division between mules and rings has not been given by the Soviet.

‡U.S A.—The division between mule and ring and the number of spindles on Egyptian are only approximate. On July 31, 1929, 30,396,000 spindles were active, and on Jan 31, 1930, 29,198,000

SPINNING SPINDLES (000's omitted) for the half-1929, on basis of returns made to Federation's Statistics.

Ring Spindles		Spinning Spindles Egyptian Cotton		Spindles in Course of Erection	
Half-year ended		Half-year ended		Half-year ended	
Jan 31, 1930	July 31, 1929	Jan. 31, 1930	July 31, 1929	Jan. 31, 1930	July 31, 1929
13,511	13,141	18,175	17,484	90	47
6,630	6,620	1,275	1,074	11	74
6,450	6,439	2,450	2,400	40	62
5,372	4,868	225	225	—	300
614	4,532	659	833	22	117
1,987	1,998	427	527	8	—
1,716	1,705	41	26	—	3
1,865	1,865	130	130	—	—
1,091	1,127	208	270	—	?
818	829	725	709	34	13
912	909	—	—	—	—
599	602	47	42	—	—
534	531	14	13	7	6
330	330	4	10	—	—
217	216	8	6	—	—
146	124	5	5	2	25
94	94	—	—	—	—
47	47	–	—	—	—
42,933	45,977	24,393	23,754	214	647
7,936	7,807	31	9	65	30
6,802	6,488	585	652	200	30
3,699	3,602	—	—	119	18
18,437	17,897	616	661	384	78
32,831	33,029	2,000	2,000	?	?
1,078	1,040	44	24	—	30
757	714	—	5	—	2
2,771	2,747	—	—	—	12
37,437	37,530	2,044	2,029	—	44
1,385	1,300	143	134	26	20
100,192	102,704	27,196	26,578	624	789

SPECIFICATION OF PART OF THE COTTON RETURNED AS "SUNDRIES" (IN ACTUAL BALES)

Six Months ending 31st January, 1930, calculated from Actual Returns

CONSUMPTION.

	Peru	Brazil	Argentine	West Indian	Mexican	Turkey	Cyprus	Mesopotamia	Sudan	East Africa	West Africa	South Africa	Australia	Chinese	Others	Total
Great Britain	52,435	70,294	33,919	5,788	3,735	2,361	184	2,274	44,027	30,915	15,863	3,765	240	—	544*	266 344
Germany	6,490	713	4,788	2,137	2,302	1,126	38	686	214	166	5,493	1,909	—	426	—	26,488
France	1,781	1,923	3,776	344	—	1,935	—	—	4,558	—	16,158	—	—	—	13,707	44,182
Italy	783	—	4,585	—	—	5,316	—	100	—	1,873	—	—	—	—	2,506	15,163
Belgium	—	—	79	138	45	—	—	—	—	—	35,877	—	—	—	17,266	53,405
Switzerland	218	—	107	5	243	36	—	44	357	119	276	—	—	—	165	1,570
Poland	348	—	587	—	—	3,005	—	117	—	—	—	—	—	11	—	4,068
Austria . ..	446	159	24	—	—	1,174	—	—	—	—	—	—	—	—	—	1,803
Czecho-Slovakia	—	48	4	—	90	1,673	—	—	—	555	410	—	—	—	3,136	5,916
China	—	—	—	—	—	—	—	—	—	—	—	—	—	762,017	1,251	763,268
Brazil	—	234,000	—	—	—	—	—	—	—	—	—	—	—	—	—	234,000
Mexico	—	—	—	—	126,000	—	—	—	—	—	—	—	—	—	—	126,000
Sweden	109	—	30	—	—	—	—	—	—	189	—	—	—	—	—	328
Holland	275	326	—	—	160	—	—	—	750	2,198	1,500	—	—	—	—	5,209
India	234	—	—	—	—	—	—	—	49	43,172	451	2,813	—	—	1,402	48,121
Japan	—	—	—	—	—	—	—	—	—	11,542	—	—	—	33,417	599 Annam & Siam 23,603 Korea 9,897 Others	79,058
Total	63,119	307,463	47,899	8,412	132,575	16,626	222	3,221	49,955	90,729	76,028	8,487	240	795,871	74,076	1,674,923

STOCKS.

	Peru	Brazil	Argentine	West Indian	Mexican	Turkey	Cyprus	Mesopotamia	Sudan	East Africa	West Africa	South Africa	Australia	Chinese	Others	Total
Great Britain	14,767	15,819	845	6,764	168	427	—	1,161	41,337	4,396	1,503	333	—	—	429	87,949
Germany	1,643	69	469	375	326	921	—	598	—	10	567	526	—	414	—	5,918
France	1,015	1,939	4,248	271	—	1,410	—	—	1,919	—	7,999	—	—	—	12,141	30,942
Italy	26	—	92	—	—	3,632	—	100	—	761	21	—	—	—	1,266	5,898
Belgium	—	—	200	182	—	—	—	—	—	—	11,102	—	—	—	3,533	15,017
Switzerland	59	—	—	—	38	16	—	14	755	83	41	—	—	—	76	1,083
Poland	226	—	—	—	—	911	—	86	—	—	—	—	—	—	—	1,223
Austria	39	95	—	—	—	219	—	—	—	—	—	—	—	—	—	353
Czecho-Slovakia	—	22	—	—	75	2,210	—	—	—	91	—	—	—	—	601	2,999
China	—	—	—	—	—	—	—	—	—	—	—	—	—	246,750	482	247,232
Brazil	—	39,000	—	—	—	—	—	—	—	—	—	—	—	—	—	39,000
Mexico	—	—	—	—	42,000	—	—	—	—	—	—	—	—	—	—	42,000
Sweden	83	—	89	11	—	—	—	—	—	95	—	—	—	—	—	278
Holland	135	65	—	—	—	—	—	—	160	259	715	—	—	—	—	1,334
India	80	—	—	—	—	—	—	—	—	21,364	33	1,715	—	—	485	23,677
Total	18,078	57,009	5,943	7,603	42,607	9,746	—	1,959	44,171	21,981	27,059	2,574	—	247,165	19,013	504,903

* Includes 325 Russian bales.

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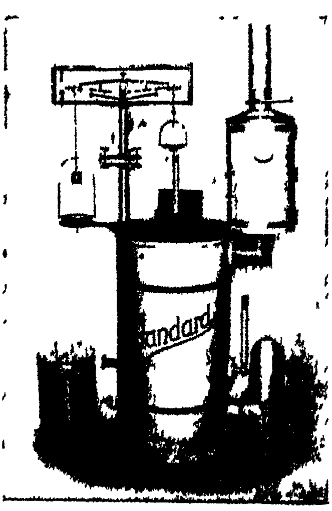

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MISCELLANEOUS

INTERNATIONAL GREY CLOTH PRICES.

The United States Department of Commerce recently issued their annual comparison of prices of cotton grey cloths on the world's representative markets, from which we give the following extracts:—

AVERAGE PRICES OF REPRESENTATIVE COTTON GREY CLOTHS

New York Market	Weekly Average Price per pound							
	1922	1923	1924	1925	1926	1927	1928	1929
SHEETINGS	cents	cents	cents	cents	cents	cents	cents	cents
36", 56×60, 4-yd ..	40·76	48·79	45·70	41·86	36·43	36·38	35·82	33·88
40", 44×40, 4·25-yd	38·15	47·20	43·22	39·77	34·17	33·33	33·20	32·26
36", 48×40, 5·50-yd	42·37	47·80	44·69	41·63	35·45	34·64	34·59	33·83
PRINT CLOTHS								
39", 80×80, 4-yd ..	48·11	54·90	53·54	51·09	42·47	42·07	43·26	40·86
39", 72×76, 4·25-yd	47·35	54·14	50·64	50·44	40·90	41·40	41·81	40·16
39", 68×72, 4·75-yd	45·95	56·11	49·77	50·68	40·57	41·12	41·73	39·73
28", 64×60, 7-yd ..	48·83	55·95	51·22	49·85	40·17	41·79	42·86	38·94
27", 56×52, 9-yd ..	50·18	60·01	53·29	52·15	*	*	*	*
Ave for 8 cloths ..	45·21	53·11	49·01	47·18	38·59	38·67	39·04	37·09
Manchester Royal Exchange								
	Converted at actual £ exchange							
38", 72×64, 3·75-yd	37·96	41·77	43·64	42·80	35·10	33·51	33·77	32·62
35", 64×56, 4·75-yd.	40·45	43·39	44·53	44·82	37·04	37·07	37·94	36·61
38", 60×56, 4·54-yd	35·42	38·39	39·44	40·48	33·72	32·88	33·56	32·40
38", 64×56, 4·54-yd	38·33	40·26	40·78	40·86	*	*	*	*
39", 64×60, 4·54-yd	*	*	*	*	35·96	36·01	36·88	35·51
38", 52×44, 5·55-yd	33·96	36·47	38·64	38·92	32·28	31·53	32·18	31·04
38", 48×48, 5·55-yd	35·95	38·20	39·41	39·05	*	*	*	*
PRINTERS								
36", 76×88, 4·25-yd	61·61	63·16	62·42	60·21	45·96	44·47	45·50	43·30
32", 68×68, 7·37-yd	49·25	56·42	61·53	59·40	46·44	46·03	47·45	46·71
Ave. (£ actual) ..	41·62	44·76	46·30	45·83	38·07	37·36	38·18	36·88

An attempt is made in the following analysis to compare the average prices of 7 American cloths, 7 English cloths, 5 Indian and 1 Japanese, together with average price of Middling American Spot on 10 Southern markets

1928 AND 1929 COMPARISONS OF INTERNATIONAL COTTON GREY PRICES, CENTS/LBS

	New York		Manchester		Bombay		Japan	Middl'g
Date	1928	1929	1928	1929	1928	1929	1929	Spots
Jan 2 ..	40·46	38·70	37·97	38·11	33·50	35·04	29·86	18·65
Feb 5 ..	38·47	37·47	36·52	37·36	33·69	34·94	30·01	18·48
March 5 ..	38·77	37·93	37·71	38·17	33·28	34·75	30·61	19·99
April 2 ..	38·73	38·18	38·54	38·13	33·11	34·94	29·70	19·37
May 7 ..	40·77	36·54	40·02	37·02	33·63	34·58	29·41	18·14
June 4 ..	38·60	35·76	39·36	36·54	34·19	34·52	28·96	18·59
July 2 ..	40·10	35·69	39·98	36·20	34·51	34·19	28·21	17·93
August 6 ..	39·00	36·94	37·94	37·63	34·85	34·10	28·66	18·55
Sept 3 ..	38·41	37·39	37·65	36·57	34·40	34·16	30·46	18·68
October 1 ..	38·76	37·78	37·40	36·37	33·81	34·18	29·18	18·29
Nov 5 ..	39·21	38·00	37·21	36·30	34·48	33·09	29·11	16·70
Dec. 3 ..	39·40	35·31	38·09	35·18	34·91	32·95	28·06	16·94
Average ..	39·04	37·09	38·18	36·88	33·95	34·30	29·41	18·23

* Not compiled

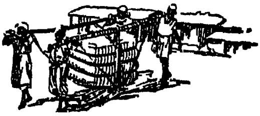
NEW USE FOR COTTON.

The Northern Air Lines, Manchester, have inaugurated an advertising service, which, if adopted to any great extent, will be the means of consuming large quantities of cotton cloth

An aeroplane seen flying over Manchester recently was one of three advertising the Port of Manchester during the Cotton Fair. The aeroplane had on each wing banners bearing the words "Manchester the nearest Port."

It is said that the aviator finds no particular difficulty in flying a machine equipped with these banners, which are 40 ft. long and 6 ft wide and exercise a drag on the machine roughly equal to the effect of the weight of the two passengers which the Avro 504 K can carry.

The actual letters run across the width of the banners, and the strokes are about 15 ins. wide. On a clear day they are readable even at a height of 3,000 ft.



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◆

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SUDAN & ARIZONA PIMA COTTONS

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COTTON TRADE STATISTICS

Cotton Goods Imports of India.

The Department of Overseas Trade, London, in their Survey of the Import Trade of India for the nine months ending December 31, 1929, publish the following information:—

The past year has been an unsettled one for all concerned in the textile business and the demand has been considerably in defect of the available supply. The most noticeable feature is the increased competition from Japan in grey and fancy goods where the rates asked for each succeeding shipment have been considerably less than the last. There has been a considerable increase latterly in the quantities of unbleached goods from Japan, also in fancy goods. In previous years Italy was the principal shipper in artificial silk varieties but recently Japan has made considerable strides in this direction.

Cotton Twist and Yarn.—The total imports increased from 30¾ million lbs. to 33½ million lbs. and the value from Rs.4½ crores to Rs.4¾ crores. The British share fell from 16½ million lbs. valued at Rs.2½ crores to 15½ million lbs. valued at Rs.2¼ crores. Our largest competitor in this trade is Japan whose share rose from 5 million lbs. to 8½ million lbs. valued at Rs. 1¼ crores. Shipments from China declined slightly to 7½ million lbs. valued at Rs.82 lakhs, while the share of Italy rose from 383,000 lbs. valued at Rs.4¾ lakhs to 1 million lbs. valued at Rs.13 lakhs. The total quantity imported is made up as follow:—

	Million lbs.
Grey	21½
White	4
Coloured	3¼
Mercerised	4½
Unspecified descriptions	¼

Grey piece goods (unbleached).—The total imports increased from 576½ million yards valued at nearly Rs.14 crores to 662½ million yards valued at Rs.15¼ crores, of which the British share declined from 411¾ million yards valued at Rs.9¾ crores to 362 million yards valued at Rs.8¼ crores. The share of Japan increased considerably from 159 million yards valued at Rs.4 crores to 291 million yards valued at Rs.6¾ crores and the share of China also increased from 4 million yards to 8 million yards valued at Rs.16½ lakhs.

White piece goods (bleached).—Shipments declined from 413 million yards valued at Rs.11¼ crores to 336 million yards valued at Rs.9½ crores, of which the British share fell from 393 million yards to 313¼ million yards valued at Rs.9 crores. Shipments from Holland and Switzerland also declined slightly to 5½ million yards valued at Rs.21½ lakhs and 5 million yards valued at Rs.21 lakhs respectively, while the share of Japan advanced from 3½ million yards valued at Rs.10½ lakhs to 7¼ million yards valued at Rs.17¾ lakhs.

Coloured, printed or dyed piece goods.—This trade also showed a decline from 387½ million yards valued at Rs.13½ crores to 352½ million yards valued at Rs.11¼ crores. The British share fell by 50 million yards to 207¾ million yards valued at Rs.7 crores. Imports from Italy declined from 32 million yards to 18 million yards valued at Rs.66¼ lakhs, while the share of Japan increased from 79 million yards to 107 million yards valued at Rs.2½ crores. Arrivals from Holland also advanced from 7½ million yards to nearly 10 million yards valued at Rs.48¾ lakhs.

Fents.—The total shipments declined from 28¼ million yards valued at Rs. 69½ lakhs to 27½ million yards valued at Rs.68½ lakhs, of which the British share fell slightly to 9¾ million yards valued at Rs.28½ lakhs while shipments from the United States of America also declined slightly in quantity from 17¾ million yards to 17½ million yards but rose in value from Rs.37 lakhs to Rs.39 lakhs.

Cotton Sewing Thread.—Imports increased in value from Rs.53 lakhs to Rs.61¾ lakhs, of which the British share was Rs.52¼ lakhs.

Artificial Silk Yarn.—The total imports rose in quantity from 5¼ million lbs. to 5½ million lbs. but declined in value from Rs. 99¾ lakhs to Rs.73¾ lakhs, of which the British share fell to Rs.15½ lakhs that of Germany to Rs.5¼ lakhs, that of Holland to Rs.5 lakhs, that of Switzerland to Rs.4½ lakhs and that of Italy to Rs.35½ lakhs, while the share of France rose slightly to Rs.8¼ lakhs. Bombay and Madras are the principal ports of entry.

Cotton and Artificial Silk piece goods.—This trade also declined from 37¾ million yards valued at Rs.2½ crores to 35¼ million yards valued at Rs.2 crores. Arrivals from all countries, except Japan, showed a decline. The British share fell from Rs.70½ lakhs to Rs.31 lakhs, that of Switzerland to Rs.25½ lakhs, that of Italy to Rs.36¼ lakhs, that of Germany to Rs.8 lakhs and that of Austria to Rs.5¾ lakhs. The share of Japan increased considerably from 1½ million yards to 14 million yards valued at Rs.84½ lakhs.

U.S.A. COTTON CONSUMPTION BY THE MILLS.

The following figures of the cotton consumed by the mills in America (excluding linters) are taken from the United States Census Bureau Reports:—

	Bales. 1929-30	Bales. 1928-29	Bales. 1927-28	Bales. 1926-27
August	558,000	527,000	633,000	501,000
September	546,000	492,000	627,000	571,000
October	641,000	618,000	613,000	569,000
November	544,000	610,000	626,000	584,000
December	454,000	534,000	544,000	605,000
January	577,000	668,000	582,000	605,000
February	495,000	598,000	574,000	590,000
March	—	633,000	581,000	694,000
April	—	632,000	525,000	619,000
May	—	668,000	577,000	633,000
June	—	570,000	511,000	663,000
July	—	546,000	438,000	569,000
Total	—	7,096,000	6,832,000	7,203,000

GREAT BRITAIN.

EXPORTS OF PIECE GOODS FROM THE UNITED KINGDOM CONTAINING ARTIFICIAL SILK AND COTTON.

Per Board of Trade Returns

(In square yards.)

	Jan./Dec. inclusive 1929	Jan./Dec. inclusive 1928
Netherlands	1,217,644	945,760
Egypt	2,659,621	3,761,327
Dutch East Indies	4,776,739	6,582,893
Philippine Islands and Guam	93,993	264,176
China (incl. Hong Kong)	1,576,689	2,218,278
United States of America	172,744	231,228
Cuba	346,371	187,623
Central America	1,084,456	2,228,695
Colombia	1,134,717	1,760,663
Venezuela	1,075,031	747,138
Brazil	4,111,786	14,330,732
Argentine Republic	929,471	816,423
British West Africa	2,642,227	2,810,226
British South Africa	4,720,382	5,416,292
British East Africa	148,671	286,856
British India—		
Bombay	4,275,243	9,430,255
Madras	250,549	131,512
Bengal, Assam, Bihar, and Orissa	9,919,782	8,618,203
Burmah	852,536	2,521,565
Straits Settlements and Malay States	445,728	963,662
Ceylon	739,372	1,502,454
Australia	8,180,927	6,204,304
New Zealand	3,375,789	2,435,153
Canada	10,251,848	9,563,116
Other Countries	15,687,461	15,426,899
Total	80,669,777	99,385,433

INDIA.

The Department of Commercial Intelligence and Statistics published last February figures relating to the eight months—April to November—working of the Indian cotton mills. We reprint below their report in part:—

In the eight months, April to November, 1929, the quantities produced were 528 million lbs. of yarn and 357 million lbs. of woven goods. These figures are compared in the statement below with those for the corresponding periods of the two preceding years:—

	Eight months, April to November			Increase (+) or Decrease (—) in 1929, as compared with corresponding months of			
	1929	1928	1927	1928		1927	
	1,000 lbs	1,000 lbs.	1,000 lbs.	1,000 lbs.	Per cent.	1,000 lbs.	Per cent.
Yarn spun . .	528,076	373,346	554,089	+154,730	+41·4	—26,013	—4·7
Woven goods manufactured	357,118	253,827	388,605	+103,291	+40·7	—31,487	—8·1

The exports of Indian yarn by sea from British India to foreign countries during the eight months, April to November, 1929, were 17 million lbs., as compared with 12 and 16 million lbs., in the corresponding periods of 1928 and 1927.

The quantity of coarse, medium, and fine yarns produced in Indian mills is compared below with the quantity imported by sea from foreign countries during November, and the eight months April to November, 1928 and 1929. The production of coarse yarn (Nos. 1 to 25) in the month of November, 1929, was 62 million lbs., and the imports of the same counts were 111,000 lbs. only; the production of medium counts (Nos. 26 to 40) was about 11 million lbs., and of fine counts (above No. 40) 1,108,000 lbs., as against 1,529,000 lbs. and 666,000 lbs., respectively, of imported yarn of the same counts.

	Month of November				Increase (+) or decrease (—) in 1929, as compared with 1928	
	1929		1928			
	Production 1,000 lbs	Imports 1,000 lbs.	Production 1,000 lbs.	Imports 1,000 lbs.	Production 1,000 lbs.	Imports 1,000 lbs.
Nos. 1 to 25	62,380	111	51,670	110	+10,704	+1
Nos. 26 to 40	10,018	1,520	10,092	2,209	+826	—680
Above No. 40 ..	1,108	666	1,064	1,043	+44	—377

	Eight months, April to November				Increase (+) or decrease (—) in 1929, as compared with 1928	
	1929		1928			
	Production 1,000 lbs.	Imports 1,000 lbs.	Production 1,000 lbs.	Imports 1,000 lbs.	Production 1,000 lbs.	Imports 1,000 lbs.
Nos. 1 to 25 ..	427,403	945	296,533	902	+130,870	+43
Nos. 26 to 40 .	86,539	13,355	67,404	12,065	+19,135	+1,290
Above No. 40 ..	9,763	6,678	5,869	6,295	+3,894	+383

The production of Indian weaving mills consists chiefly of the descriptions of goods stated below with the quantity (in thousands of pounds and their equivalents in yards):—

	Month of November						
	1929		1928		Increase (+) or decrease (—) in 1929, as compared with 1928		
	1,000 lbs.	1,000 yds.	1,000 lbs.	1,000 yds.	1,000 lbs	1,000 yds.	Per cent.
Grey and bleached piece goods .							
Shirtings and longcloth	12,135	53,666	11,097	48,668	+1,038	+4,998	+9·4
T-cloth, domestics and sheetings	2,173	8,103	1,973	7,218	+200	+885	+10·1
Dhutis	12,661	62,229	9,840	49,257	+2,821	+12,972	+28·7
Chadars	2,332	6,014	2,391	6,284	—59	—270	—2·5
Khadi, Dungri or Khaddar ..	5,401	15,488	3,685	10,762	+1,716	+4,726	+46·6
Coloured piece goods . ..	12,207	58,143	10,720	49,164	+1,487	+8,979	+13·9

	Eight months, April to November						
	1929		1928		Increase (+) or decrease (—) in 1929, as compared with 1928		
	1,000 lbs.	1,000 yds.	1,000 lbs	1,000 yds.	1,000 lbs.	1,000 yds.	Per cent.
Grey and bleached piece goods :							
Shirtings and longcloth ..	82,157	367,596	57,912	258,041	+24,245	+109,555	+41·9
T-cloth, domestics and sheetings	14,517	55,819	10,810	42,497	+3,707	+13,322	+34·3
Dhutis	101,084	502,381	72,866	353,487	+28,218	+148,894	+38·7
Chadars .. .	16,199	45,034	12,807	35,331	+3,392	+9,703	+26·4
Khadi, Dungri or Khaddar ..	28,445	82,234	18,119	54,070	+10,326	+28,164	+57·0
Coloured piece goods . .	78,907	372,913	54,527	254,675	+24,380	+118,238	+44·7

The following statement compares the production of piece goods woven in Indian mills with the imports from foreign countries:—

	Month of November				Eight months, April to November			
	1929		1928		1929		1928	
	Production 1,000 yds.	Imports 1,000 yds	Production 1,000 yds.	Imports 1,000 yds.	Production 1,000 yds	Imports 1,000 yds.	Production 1,000 yds.	Imports 1,000 yds.
Grey and bleached piece goods ..	102,037	110,997	136,523	108,665	1,156,087	93,489	823,121	888,171
Coloured piece goods	58,143	36,960	49,164	40,480	372,913	325,136	254,675	359,718

JAPAN.

COTTON YARN EXPORTS (WITH COUNTS) FOR YEAR 1929

Country of Destination	20's	16's	14's & below	32's	40's	42's	43's & above	Total
Shanghai ..	357½	1	26	1,512	11½	796	4,590½	7,294½
Tientsin ..	63	—	—	300½	5	840½	324½	1,533½
Tsingtau ..	27	½	- -	255½	—	674½	1½	959
Dairen ..	1,561	23½	128	372	1½	376	17½	2,479½
Hankow ..	—	—	—	41	—	—	—	41
Manchuria (via Antung) ..	4,840	197½	39	604	4½	2,308	84	8,077
China ..	—	—	—	—	—	2	—	2
Hong Kong ..	2,829	428	415	1,415	218½	1,799	87	7,191½
Philippian ..	301	21½	17½	545½	600½	18½	384½	1,798
Singapore ..	12½	—	—	57½	25	—	29½	124½
Bombay ..	11½	10½	—	772	1,320½	6,282	14,044	22,440½
Calcutta ..	—	—	15	78	1,276	539	90½	1,998½
India	8	—	20	157	563	1,214	1,138	3,100
Dutch India ..	381	38	423	1½	1,304½	41½	83	2,272½
San Francisco	809	31	258	4	—	—	—	1,102
Central America	1,762½	62	368	1	14	—	3	2,210½
Egyptian ..	531	—	2	—	25	33	15½	606½
Others ..	1,805	148	755½	64½	188½	1,357	84½	4,403
Total ..	15,308	961½	2,467	6,181	5,558	16,281	20,877½	67,634

JAPAN—*Continued.*

	Exports of Coloured, Printed and Dyed Cotton Goods during the years 1928–1929		Exports of Bleached Cotton Goods during the years 1928 1929		Exports of Grey Cotton Goods during the years 1928-1929	
	Total for 1929	Total for 1928	Total for 1929	Total for 1928	Total for 1929	Total for 1928
Shanghai ..	192,452,165 60,536,988	174,687,261 59,184,263	41,185,160 9,940,830	30,682,753 9,777,674	20,812,012 4,769,476	21,236,593 4,527,362
Tientsin	37,690,251 11,009,736	51,162,776 16,452,522	6,832,758 1,521,180	10,916,794 2,614,871	18,887,494 4,216,268	21,197,893 4,946,450
Tsingtao	27,103,730 8,100,666	15,559,153 4,919,669	5,217,071 1,234,441	2,907,919 718,045	4,875,578 1,082,719	2,570,192 533,914
Dairen	31,187,378 9,622,265	27,516,911 9,008,419	6,211,667 1,396,866	5,374,655 1,180,551	18,954,881 4,333,602	20,714,135 4,852,306
Hankow	13,538,720 4,547,639	19,249,734 6,828,673	4,150,293 1,009,427	8,003,287 1,954,253	776,535 186,272	3,316,465 705,266
Hong Kong ..	60,069,714 15,523,827	43,660,170 12,105,116	6,430,256 1,490,089	6,982,973 1,562,441	18,108,373 3,767,429	17,773,460 3,769,494
Manchuria ..	66,041,714 20,599,072	58,896,802 20,285,608	18,253,225 4,331,366	15,284,692 3,619,700	71,724,538 16,553,551	87,171,106 21,302,506
Other China ..	1,750,088 197,664	219,255 77,629	220,387 48,133	81,143 19,232	265,862 68,332	217,227 45,408
British India ..	129,069,118 29,939,300	89,211,207 21,550,675	16,356,017 3,387,807	7,215,767 1,512,559	434,976,589 75,743,080	261,321,043 47,130,481
Dutch India ..	132,743,301 30,858,184	109,717,590 27,202,805	10,784,975 2,533,064	7,928,440 1,832,197	50,099,939 8,914,877	55,627,021 10,339,401
French India ..	66,756 20,510	470,515 104,988	— —	3,195 755	488,888 9,341	10,750 5,540
Egypt	41,351,189 9,477,444	27,191,236 6,147,865	861,405 182,307	739,133 155,867	65,150,915 14,729,227	49,263,562 11,245,523
Africa	17,338,526 3,836,236	12,350,850 2,843,454	2,972,259 648,801	1,638,544 375,038	34,757,903 7,602,086	15,711,629 3,368,208
Australia	5,655,584 1,427,079	4,627,400 1,100,084	591,452 138,816	1,281,469 309,325	7,556,404 1,365,326	6,420,758 983,429
Singapore ..	26,564,691 5,112,305	13,841,329 2,987,802	1,925,428 399,126	606,579 137,178	1,466,762 367,561	888,510 272,631
Philippine ..	23,584,643 4,782,713	21,603,237 5,398,507	2,561,265 568,600	3,514,934 882,450	1,400,202 272,335	2,742,329 507,585
Balkan States ..	249,805 55,691	299,322 67,430	43,233 9,772	1,870 554	2,006,527 378,539	3,196,113 593,418
South America ..	13,808,143 3,414,192	6,084,807 1,619,652	1,093,506 276,100	1,533,221 391,248	14,248,866 3,142,088	8,506,276 1,820,929
Siam	13,201,353 2,802,206	4,406,604 912,672	1,534,956 351,328	607,623 143,985	3,181,827 661,675	1,331,434 302,808
Arabia Persia ..	5,340,757 1,254,913	2,583,453 618,134	339,822 75,656	108,537 24,928	43,062,096 9,297,069	26,232,295 5,566,580
Others	7,568,414 1,686,081	8,107,338 1,900,302	521,256 104,939	1,163,882 293,506	2,314,810 464,557	2,007,553 397,809
Total	847,176,003 225,090,711	695,086,040 201,306,280	128,086,301 29,648,667	115,607,410 27,506,357	815,577,001 157,806,560	607,456,344 123,226,138

(NOTE :—The upper line indicates square yards and the lower indicates yen).

JAPAN -*Continued.*

	Exports of Coloured, Printed, and Dyed Cotton Goods during the years 1928-1929		Exports of Bleached Cotton Goods during the years 1928-1929		Exports of Grey Cotton Goods during the years 1928-1929	
	Total for 1929	Total for 1928	Total for 1929	Total for 1928	Total for 1929	Total for 1928
Drills	96,719,632 21,764,428	59,532,513 13,143,075	1,072,480 270,600	1,001,065 209,764	33,041,796 8,053,318	27,992,946 6,565,588
Jeans	160,068,855 39,214,846	120,268,603 32,432,267	5,011,130 1,430,142	5,059,874 1,335,126	31,109,500 7,036,209	33,319,057 8,327,753
Sheeting	— —	— —	337,890 77,756	311,411 53,030	173,358,291 37,054,761	118,966,078 25,491,543
Shirting	58,074,460 11,201,491	49,474,321 9,984,140	107,300,270 24,860,154	90,313,491 21,580,006	528,582,066 93,257,467	307,039,400 69,808,028
T. Cloth ..	35,597,567 6,995,985	30,095,737 6,712,023	552,026 121,025	578,367 122,867	11,826,862 2,453,782	10,119,833 2,124,959
Imitation Nankeens	— —	— —	1,114,177 168,499	2,017,465 353,898	29,766,249 7,087,572	32,089,174 8,244,978
Canvas	1,283,908 479,483	970,938 392,788	— —	— —	2,719,762 1,348,621	2,180,410 1,111,267
Satin	48,616,113 56,142,750	145,312,468 61,042,355	— —	— —	— —	— —
Print	57,316,876 11,197,632	58,193,060 12,731,934	— —	— —	— —	— —
Flannel	57,660,330 15,036,795	41,364,351 11,450,183	2,706,479 815,733	2,970,467 895,582	3,762,731 1,277,694	3,670,801 1,317,538
Crepe	24,667,185 4,568,303	23,304,422 4,702,460	7,279,955 1,410,061	10,398,650 2,128,333	— —	1,164 248
Mousseline de lain	16,776,763 3,516,426	10,548,352 2,390,752	— —	— —	863 160	1,330 268
Cotton Nankeens	3,001,118 649,472	3,507,268 801,484	— —	— —	— —	— —
Striped Tissues ..	88,084,762 19,490,936	80,681,499 18,101,419	— —	— —	— —	— —
Poplin	7,469,120 2,860,194	6,484,387 2,820,521	— —	— —	— —	— —
Others	91,889,308 31,950,970	65,348,124 24,335,967	1,811,984 476,688	3,256,600 827,661	1,408,881 236,076	1,276,591 283,968
Total	347,176,003 125,099,711	695,086,040 201,346,288	128,086,391 29,648,667	115,907,410 27,506,357	815,577,001 157,806,560	607,456,344 123,226,188

(NOTE :—The upper line indicates square yards and the lower indicates yen).

U.S.A. Exports of Cotton, Cotton Yarns and Cloths for 12 months ending December, 1929.

Articles and Countries to which exported	Unit of Quantity	Twelve months ending December			
		1928		1929	
		Quantity	Value	Quantity	Value
			$		$
COTTON UNMANUFACTURED ..	bale lb.	8,732,863 4,579,426,432	920,008,963	7,580,383 3,981,509,485	770,830,254
Raw cotton except linters ..	bale lb.	8,546,419 4,471,842,390	912,848,839	7,417,734 3,884,766,250	764,759,978
Long staple (1⅛ in. or over):					
American Egyptian (Pima)	bale lb.	— —	—	4,545 2,493,084	849,393
Other long staple (including sea-island)	bale lb.	1,105,088 579,566,815	123,296,753	574,312 300,403,496	62,412,750
Short staple (under 1⅛ in.) ..	bale lb.	7,441,331 3,892,275,575	789,552,086	6,838,877 3,581,869,670	701,497,835
Belgium	bale lb.	202,723 105,396,500	22,168,845	165,099 87,486,651	17,539,987
Finland	bale lb.	13,732 7,483,448	1,548,460	8,579 4,641,916	901,657
France..	bale lb.	819,137 433,050,730	90,836,420	810,237 430,349,453	86,180,022
Germany	bale lb.	2,037,872 1,070,830,195	217,801,004	1,652,220 869,291,181	169,457,281
Italy	bale lb.	737,505 386,227,953	78,835,695	770,125 405,249,322	79,600,049
Netherlands	bale lb.	162,388 86,832,611	18,209,009	143,078 76,961,531	15,457,451
Norway	bale lb.	4,260 2,246,985	451,296	5,675 2,990,688	578,203
Portugal	bale lb.	40,979 22,251,000	4,555,083	56,082 30,448,723	6,030,411
Soviet Russia in Europe ..	bale lb.	429,393 223,481,836	44,536,918	289,161 150,288,520	29,492,530
Spain	bale lb.	314,264 169,205,881	34,416,749	269,191 145,922,069	28,793,709
Sweden	bale lb.	55,084 29,112,642	5,827,568	52,570 28,099,020	5,436,280
Switzerland	bale lb.	4,050 2,151,313	450,346	4,050 2,150,696	463,834
United Kingdom	bale lb.	1,907,305 1,030,776,656	211,309,075	1,533,929 794,947,688	159,714,633
Other Europe..	bale lb.	29,566 15,828,821	3,340,520	26,765 14,361,704	2,871,837
Canada	bale lb.	234,103 120,428,678	24,218,700	234,061 120,861,896	23,055,456
British India	bale lb.	63,780 33,680,256	6,684,461	15,005 8,032,678	1,565,489
China, Hong Kong, and Kwantung	bale lb.	170,333 89,054,745	17,742,588	233,066 120,604,153	23,148,573
Japan	bale lb.	1,225,473 641,571,769	120,272,021	1,100,837 567,360,718	109,390,003
Other countries	bale lb.	4,382 2,230,371	464,078	47,104 24,618,643	5,013,573
Linters	bale lb.	186,444 107,584,042	7,160,124	162,649 96,743,235	6,070,276
COTTON SEMI-MANUFACTURES	lb.	109,667,737	24,225,044	108,162,706	23,897,285
Cotton mill waste	lb.	63,429,437	7,118,832	50,129,559	6,744,096
Cotton rags, except paper stock	lb.	19,108,924	1,428,357	21,095,634	1,541,930
Cotton batting, carded cotton and roving	lb.	414,864	75,539	446,301	85,812
Cotton yarn—					
Carded yarn, not combed ..	lb.	13,159,500	4,877,313	13,919,250	4,681,954
Europe	lb.	200,321	80,367	55,936	34,758
Canada	lb.	598,749	259,085	595,972	264,771
Salvador	lb.	260,654	93,120	363,143	128,385
Newfoundland & Labrador	lb.	247,429	71,785	857,180	237,680
Argentina	lb.	8,387,911	3,135,542	8,096,330	2,655,742
Chile	lb.	1,060,881	365,858	1,495,655	508,158
Colombia	lb.	509,609	171,237	785,558	246,953
Uruguay	lb.	1,004,617	347,591	590,644	208,244
Other South America ..	lb.	192,436	88,370	101,487	34,644
Other countries	lb.	696,893	264,358	977,345	362,619

U.S.A. EXPORTS—*Continued.*

Articles and Countries to which exported	Unit of Quantity	Twelve months ending December			
		1928		1929	
		Quantity	Value	Quantity	Value
			$		$
Combed yarn	lb.	13,465,102	10,725,003	13,571,962	10,843,493
Mercerised	"	11,098,006	9,490,195	12,045,768	10,039,415
Not mercerised	"	2,367,006	1,234,808	1,526,194	804,078
United Kingdom	"	1,262,139	1,138,676	1,083,622	1,067,209
Canada	"	2,301,568	1,971,479	2,601,084	2,247,553
Mexico	"	461,506	406,381	512,415	414,870
Argentina	"	4,520,913	3,519,900	4,210,247	3,125,500
Brazil	"	1,346,389	1,222,730	843,643	738,144
Chile	"	414,576	312,786	649,324	511,127
Uruguay	"	284,954	235,545	378,407	288,833
Other South America	"	648,018	270,863	327,249	169,811
Australia	"	1,534,122	1,165,659	1,587,309	1,356,275
Other countries	"	690,737	480,984	1,378,662	924,171
COTTON MANUFACTURES	"	—	110,418,515	—	111,215,676
Cotton thread and cordage : ..					
Sewing thread	"	1,030,568	1,023,236	1,053,882	1,149,515
Crochet, darning and embroidery cotton	"	134,509	160,106	82,825	96,781
Twine and cordage	"	3,754,838	1,490,599	4,588,069	1,811,740
Cotton cloth, duck, and tire fabric..	sq. yd.	546,847,456	79,298,554	564,448,789	79,410,467
Tire fabric :					
Cord	"	4,742,057	2,112,780	4,969,963	2,217,421
Other	"	1,668,438	523,071	1,355,239	472,945
Cotton duck	"	13,846,669	4,776,690	15,119,871	5,229,528
Heavy filter, paper dryer, hose and belting duck	"	639,518	451,457	688,618	412,641
Unbleached (grey) :					
Ounce	"	5,162,357	1,487,719	6,045,770	1,712,012
Numbered	"	4,742,641	1,827,813	4,249,118	1,720,523
Bleached	"	1,935,005	558,324	2,293,417	743,777
Coloured	"	1,367,148	451,377	1,842,948	631,575
Cotton cloth, unbleached (grey) ..	"	124,293,510	11,712,364	137,836,942	12,444,926
Drills and twills	"	13,431,401	1,664,138	12,469,675	1,580,059
Sheetings 40 in. and under ..	"	73,485,032	6,585,943	82,174,153	7,166,814
Greece	"	1,001,049	130,783	1,298,257	158,085
Other Europe	"	940,611	1,119,926	1,965,685	194,624
Canada	"	4,763,477	461,100	7,973,134	702,441
Salvador	"	5,178,163	441,219	6,531,055	560,143
Other Central America ..	"	8,514,348	776,416	10,311,933	928,132
Mexico	"	81,021	12,482	53,177	6,764
Jamaica	"	2,983,875	230,523	4,219,012	361,311
Cuba	"	5,084,767	437,773	5,026,568	425,645
Dominican Republic	"	1,459,470	143,416	1,691,648	164,265
Haiti, Republic of	"	4,914,610	430,658	2,796,400	224,246
Other West Indies & Bermudas	"	402,786	44,280	478,338	48,621
Argentina	"	1,746,304	143,111	2,612,900	212,854
Bolivia	"	3,981,482	403,484	2,063,860	190,014
Chile	"	3,233,275	330,959	3,561,818	343,894
Colombia	"	6,124,984	558,253	4,989,706	408,085
Peru	"	649,486	67,626	508,092	55,632
Venezuela	"	348,913	34,438	330,697	30,100
Other South America	"	2,967,282	255,158	3,407,643	268,569
Aden	"	3,442,605	220,003	3,647,103	272,557
British India	"	321,684	36,251	1,498,284	165,641
Philippine Islands	"	6,399,595	571,149	6,806,046	595,732
Oceania	"	642,203	65,615	1,086,329	98,877
British Africa	"	5,081,051	399,505	5,828,079	448,283
Other countries	"	2,471,991	271,815	3,420,389	312,281
Sheetings over 40 in.	"	1,627,949	190,725	1,561,372	170,747
Osnaburgs	"	20,274,648	2,082,649	22,581,106	2,292,148
All other unbleached	"	15,474,480	1,188,909	19,050,636	1,235,158

U.S.A. EXPORTS—*Continued.*

Articles and Countries to which exported	Unit of Quantity	Twelve months ending December			
		1928		1929	
		Quantity	Value	Quantity	Value
			$		$
Cotton cloth, bleached	sq. yd.	96,268,754	11,097,757	89,303,349	10,590,472
Drills and twills	"	—	—	4,507,030	678,925
Pyjama checks	"	—	—	10,412,548	1,076,341
Sheetings 40 in. wide and under	"	—	—	33,575,043	3,849,494
Europe	"	—	—	350,576	49,879
Canada	"	—	—	2,011,730	195,717
Central America . ..	"	—	—	2,422,187	262,803
Mexico	"	—	—	585,487	75,412
Cuba	"	—	—	5,300,967	578,779
Dominican Republic	"	—	—	1,301,708	139,633
Haiti, Republic of	"	—	—	507,371	49,870
Other West Indies & Bermudas	"	—	—	450,856	51,870
Argentina	"	—	—	1,044,352	108,523
Chile	"	—	—	340,755	39,140
Colombia	"	—		550,003	78,574
Peru	"	—	—	149,305	22,175
Other South America	"	—	—	1,219,015	145,291
Philippine Islands	"	—	—	15,762,552	1,864,080
Other countries .. .	"	—		1,578,197	186,848
Sheetings over 40 in. wide ..	"	—	—	12,960,689	1,712,039
All other bleached..	"	—	—	27,839,039	3,278,673
Cotton cloth, coloured .. .	"	306,028,028	49,074,992	315,863,425	48,455,175
Voiles	"	46,020,214	7,326,956	56,378,646	8,048,951
Percales and prints, 32 in. and narrower	"	33,521,561	3,548,621	29,991,139	3,114,296
Percales and prints, over 32 in. wide	"	11,863,392	1,577,066	11,595,083	1,610,203
Flannels and flannelettes ..	"	4,898,333	728,338	4,451,811	684,812
Khaki and fustians .. .	"	4,342,337	876,348	4,526,474	904,219
Denims	"	14,518,023	2,857,331	17,229,538	3,152,250
Suitings (drills, etc.)	"	27,222,724	4,618,424	30,343,950	4,027,863
Ginghams	"	13,324,215	1,511,788	14,001,954	1,466,375
Chambrays	"	12,338,530	1,372,486	16,447,828	1,751,199
All other printed fabrics	"	40,911,903	7,314,787	—	—
7½ yds. per lb. and lighter .	"	—	—	27,556,474	4,451,922
Heavier than 7½ yds. per lb. ..	"	—	—	20,847,631	3,691,987
All other piece-dyed fabrics ..	"	58,680,722	9,470,330	—	—
5 yds. per lb. and lighter ..	"	—	—	24,717,573	3,704,941
Heavier than 5 yds. per lb. ..	"	—	—	19,201,400	2,808,208
All other yarn-dyed fabrics ..	"	23,309,135	3,714,871	19,807,137	2,963,458
Cotton and rayon mixtures (chief value cotton)	"	15,076,939	4,157,646	18,766,787	5,174,491
Other cotton fabrics :					
Blankets	lb.	1,353,162	817,121	1,569,156	885,311
Damasks	sq. yd.	779,687	212,877	780,072	244,629
Pile fabrics, plushes, velveteens, and corduroys	"	634,973	512,743	494,061	412,193
Tapestries and other upholstery goods	"	431,870	258,414	293,125	305,280
Cotton fabrics sold by the lb. ..	lb.	9,003,965	3,337,259	10,129,620	3,756,248
Cotton wearing apparel		—	14,339,032	—	14,768,153
Knit goods :					
Gloves	doz. prs.	88,300	157,882	125,563	219,413
Hosiery	"	3,876,517	6,729,106	3,777,534	6,442,049
Women's	"	2,031,507	3,700,981	1,941,831	3,442,369
Children's	"	714,818	1,125,265	751,213	1,143,977
Men's socks .	"	1,130,192	1,902,860	1,084,490	1,855,703
United Kingdom	"	275,411	443,140	422,166	719,356
Other Europe	"	322,300	753,101	288,769	636,438
Canada	"	524,743	782,228	605,381	919,828

U.S.A. EXPORTS—*Continued.*

Articles and Countries to which exported	Unit of Quantity	Twelve months ending December			
		1928		1929	
		Quantity	Value	Quantity	Value
			$		$
Central America	doz. prs.	333,704	594,372	337,580	604,253
Mexico	„	75,283	174,767	42,605	107,963
British West Indies and Bermudas	„	128,625	190,932	159,055	247,947
Cuba	„	609,709	1,061,126	506,194	730,610
Dominican Republic	„	90,282	136,965	117,308	177,534
Argentina	„	40,260	103,340	20,657	61,463
Chile	„	61,328	113,496	50,416	88,999
Colombia	„	319,580	608,916	195,395	373,919
Peru	„	160,103	235,589	209,717	292,415
Uruguay	„	58,239	100,465	43,288	71,976
Venezuela	„	137,398	239,897	117,331	199,592
Other South America	„	130,247	191,543	159,729	239,084
British India	„	36,532	93,519	46,447	109,690
Philippine Islands	„	123,545	229,877	101,205	187,738
Australia	„	14,486	41,427	7,069	21,202
British South Africa . ..	„	90,641	178,034	104,457	179,910
Other countries	„	254,151	461,372	242,815	472,128
Underwear	doz.	583,604	2,108,485	610,616	2,194,452
Sweaters, shawls, and other knit outerwear	No.	566,403	460,797	504,912	419,844
Other wearing apparel :					
Collars and cuffs	doz.	287,356	424,725	231,206	311,029
Cotton overalls, breeches and pants	„	33,255	421,077	53,965	662,670
Underwear, not knit . ..	„	120,438	580,636	116,511	588,583
Shirts	„	184,279	1,768,983	236,450	2,072,998
Dresses, skirts and waists ..	No.	455,640	511,331	610,126	596,177
Other cotton clothing		—	1,176,010	—	1,310,938
Other cotton manufactures :					
Handkerchiefs	doz.	237,962	155,849	213,752	145,355
Laces, embroideries and lace window curtains	yd.	5,431,426	210,820	4,264,710	215,750
Woven belting for machinery ..	lb.	478,097	285,397	424,119	242,368
Cotton bags	„	9,353,520	2,064,873	5,906,326	1,209,801
Quilts, comforts, counterpanes, and bedspreads	No.	193,898	275,459	184,863	272,529
Bed sheets, pillow, bolster, and mattress cases	doz.	29,326	218,128	36,803	276,563
Towels, bath mats and wash cloths	„	783,620	1,097,330	907,073	1,326,797
Other cotton manufactures ..	„	—	4,660,718	—	4,686,196

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Reviews on Current Cotton Literature.

"THE NEW YORK COTTON EXCHANGE YEAR BOOK," 1928-29, being the second year book of the New York Cotton Exchange. This valuable booklet contains the more important cotton statistics and tabulations of the world's cotton trade, besides giving the principal facts as to the organization and activities of the Exchange. The Garside Cotton Service was recently taken over by the New York Cotton Exchange, and is known as the New York Cotton Exchange Service, and this year they have added several more tables which greatly enhance the value of the publication as a reference book.

"SHIRLEY INSTITUTE MEMOIRS," Vol. VIII, 1929; published by the Shirley Institute, Didsbury, Manchester. This volume contains highly technical articles on the work carried out at the Shirley Institute. Among the subjects dealt with and likely to be of interest to cotton mill men are the following: Absorption of water by cotton; the influence of humidity on the elastic properties of cotton; the swelling of cellulose; absorption, transmission and reflection of radiant heat by fabrics; transfer of moisture through fabrics; chemical analysis of cotton; the dry weight of cotton.

"BIBLIOGRAPHY ON THE RELATION OF CLOTHING TO HEALTH," by Ruth O'Brien; published by the U.S. Department of Agriculture, at 25 cents. This bibliography includes references to English, French and German books, and articles relating to the hygienic aspects of clothing. In all 1,184 books, pamphlets, etc. on the subject of clothing for health have been reviewed in this Bulletin.

"EMPIRE COTTON GROWING CORPORATION," Millbank House, Millbank, London, S.W.1; Reports received from Experiment Stations, 1928-29. (Price 2s. 6d.) This publication contains accounts of the work undertaken during the past year at the Corporation's Experimental Cotton Stations in Queensland, South Africa, Swaziland, Northern and Southern Rhodesia, the Anglo-Egyptian Sudan, Uganda, Nyasaland, Nigeria and Fiji.

"THE INDIAN COTTON TEXTILE INDUSTRY," by M. P. Gandhi, Secretary, Indian Chamber of Commerce, 135, Canning Street, Calcutta, or 85, Gracechurch Street, London, E.C.3. (6s.) The author deals with the fall of the old hand cotton-spinning industry under early British rule and the subsequent rise of the Indian cotton mill industry. There are also chapters relating to the very early hand-loom industry; the cultivation of cotton in India, and the post-war cotton mill industry.

"THE SILK AND RAYON DIRECTORY AND BUYERS' GUIDE OF GREAT BRITAIN," published by John Heywood Ltd., Manchester, at 21s. This very useful directory has again been considerably increased in size, necessitated by the ever-increasing number of firms using rayon yarns in the manufacture of both woven and knitted fabrics. The world's list of rayon producers has been brought up to date and additional information on each firm has been furnished. A very useful innovation is a compilation of all branded trade names with the names of the firms producing the material.

"COTTON YEAR BOOK, 1930," *Textile Mercury*, 20, Mount Street, Manchester, at 7s. 6d. This very useful compendium of the cotton trade has recently achieved its twenty-fifth edition. It is looked upon as an authoritative reference book on all matters relative to the cotton trade. The chapters dealing with cotton mill practice and calculations, etc., will be of great benefit both to the student and cotton mill men.

"THE PREPARATION AND WEAVING OF ARTIFICIAL SILK OR RAYON" is the title of a book, the author if which is Thomas Woodhouse, F.T.I., published by Sir Isaac Pitman & Sons, Ltd., Parker Street, Kingsway, London, W.C.2, at 10s. 6d. This is the first English book published that deals with the complete operation of preparation and weaving of rayon yarns and should serve as a valuable reference book to cotton manufacturers. This publication is admirably bound and printed and contains 231 pages; it is well illustrated with sketches and photographs. There are chapters on reeling, doubling, the various types of winding, warping, sizing, beaming, drawing-in, reeding, gaiting and, finally, weaving.

"RELATORIO DA DELEGACIA DO SERVICO FEDERAL DO ALGODÃO NA PARAHYBA, ANNO DE 1928," by the Superintendent, F. L. Alves Costa. This publication is an account of the experimental work undertaken in connection with cotton research work on the State cotton experimental stations in Parahyba.

"EMPIRE COTTON GROWING REVIEW FOR APRIL," price 1s., contains articles on cotton in Sierra Leone, Sea Island cotton, ginning technique, etc. The quarterly journal is published by P. S. King & Son, Ltd., 14, Great Smith Street, London, S.W.1.

The Indian Central Cotton Committee have recently published a bulletin (Series B, No. 5) by Harirao Navkal & K. R. Sen, entitled "A Comparison of Some Methods of Testing the Breaking Strength of Single Cotton Fibres." The authors discuss the merits and demerits of three types of instruments usually used for the determination of breaking strengths of single cotton fibres, namely the hydrostatic (O'Neill's), the balance (Barratt's) and the pendulum (Ball's Magazine Hair Tester). The errors of the three instruments are discussed in detail. It is concluded that the value got by the Barratt Tester is much higher than that got by the other two, both of which seem to agree fairly well if a large number of readings are taken and if calcium chloride solution is used instead of water in the O'Neill Tester; the Magazine Tester has the advantage in speed of working and the O'Neill Tester in economy of first cost

"GACETA ALGODONERA" The special annual number of this journal, solely devoted to the cotton-growing interests in Argentine, contained very excellent information on recent developments in the rapidly expanding cotton-growing industry of that country

"PROSPETTIVE ECONOMICHE," 1930, published by Professor Georgio Mortara, of the University of Milan Among some very comprehensive chapters on the more important world's industries, Professor Mortara includes in this volume his usual excellent review of the World's Cotton Industry, with special reference to Italy during 1929

"HIGH DRAFTING IN COTTON SPINNING" by Charles Barnshaw Published by Ernest Benn Ltd, Bouverie House, Fleet Street, London, E C 4, at 21s The author of this highly instructive treatise on High Drafting in Cotton Spinning is the head of the spinning section of the textile department of the Municipal Technical College of Blackburn Owing to the considerable extension of the practice of high drafting and the introduction of modified drafting arrangements for this purpose this work should be of much interest to cotton spinners Although the main object has been to deal with high-draft arrangements, the author refers to the character of the raw material and to those preliminary operations which affect the process of drawing Mr Barnshaw has also dealt somewhat fully with the conditions under which drafting occurs in the ordinary drawing-roller arrangements, as a preliminary to a consideration of the newer high-drafting methods The various high-drafting arrangements which have been dealt with are fairly representative of the various types in use, some general considerations involved in high drafting and the advantages claimed from the use of such arrangements are dealt with

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BOOKS RECEIVED

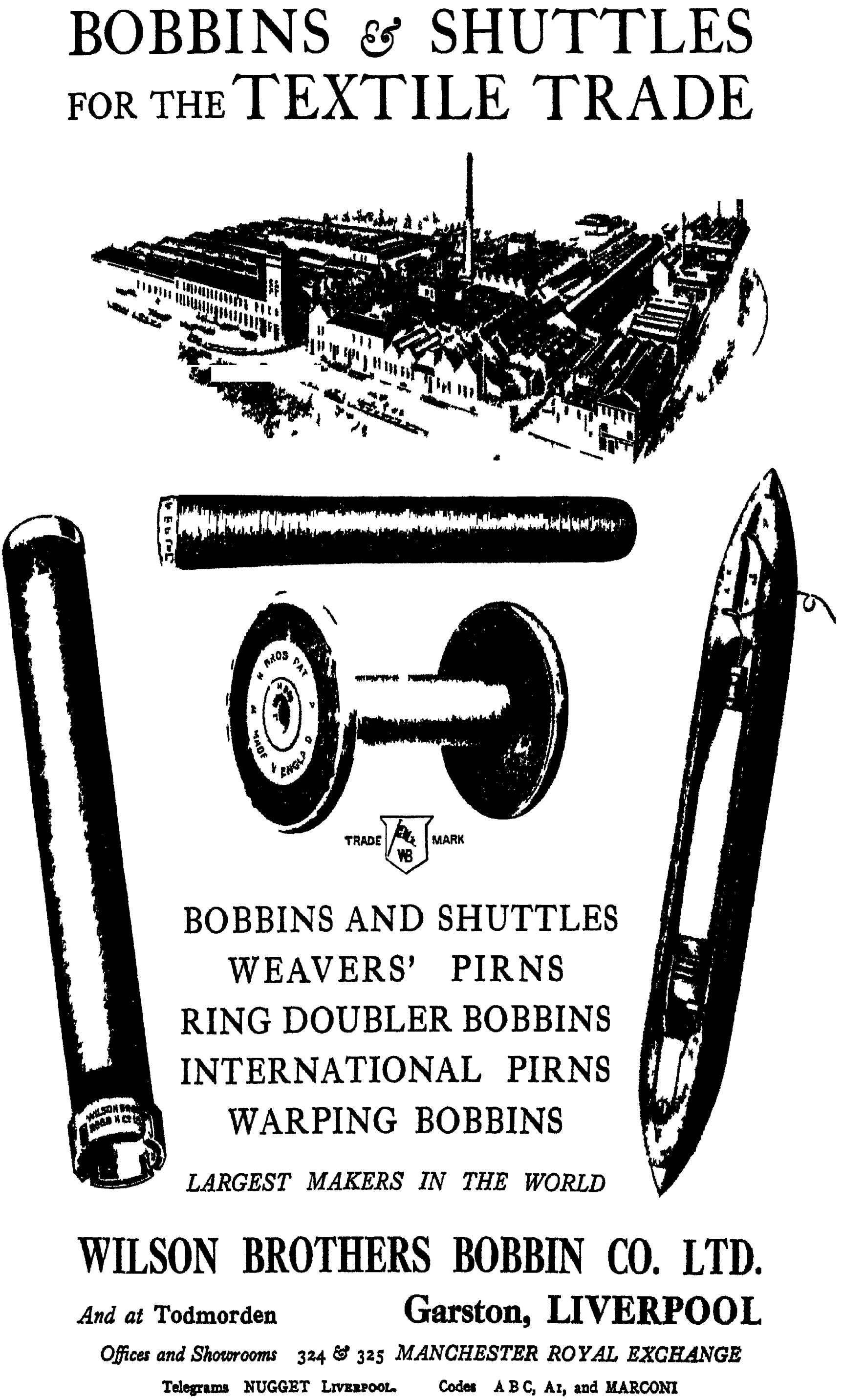
"CONDITIONS OF WORK IN SPIN ROOMS." U S Department of Labour Bulletin of the Woman's Bureau No 72 (10 cents

"ECONOMIC CONDITIONS IN CHINA" 2s 6d

"ECONOMIC CONDITIONS IN AUSTRIA" 2s Published by Department of Overseas Trade through H M Stationery Office, Adastral House, Kingsway, London, W C 2

"MEMOIRS OF THE COTTON RESEARCH STATION, TRINIDAD" Studies of the Transport of Nitrogen in the Cotton Plant Empire Cotton Growing Corporation, Wheel Street, Millbank, London, S W

"RELATORIO DO CENTRO INDUSTRIAL DE FIACAO E TECELAGEM DE ALGODAO," Rio de Janeiro 1929



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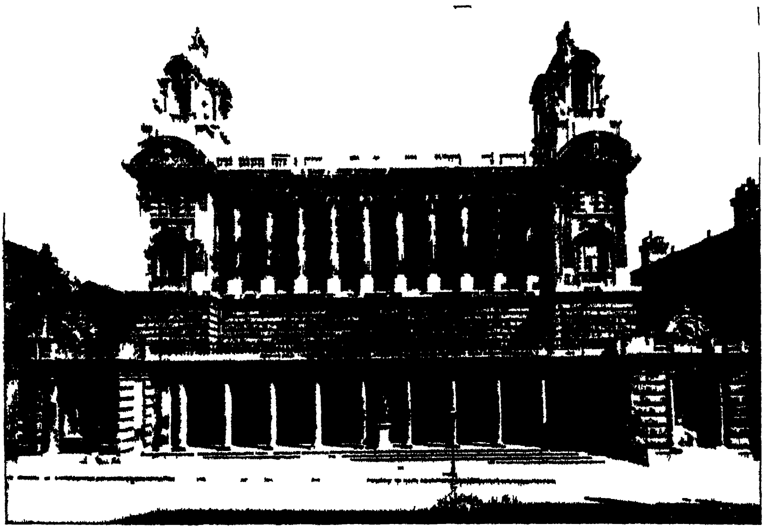

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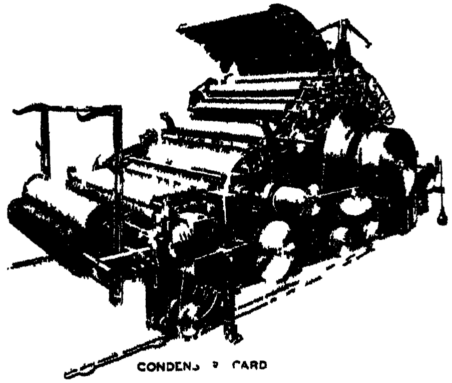

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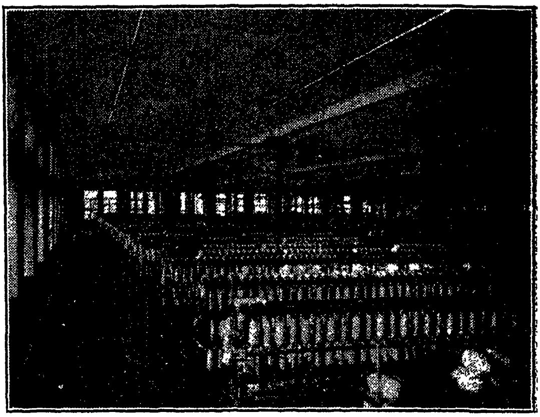

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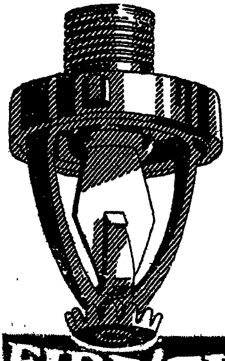

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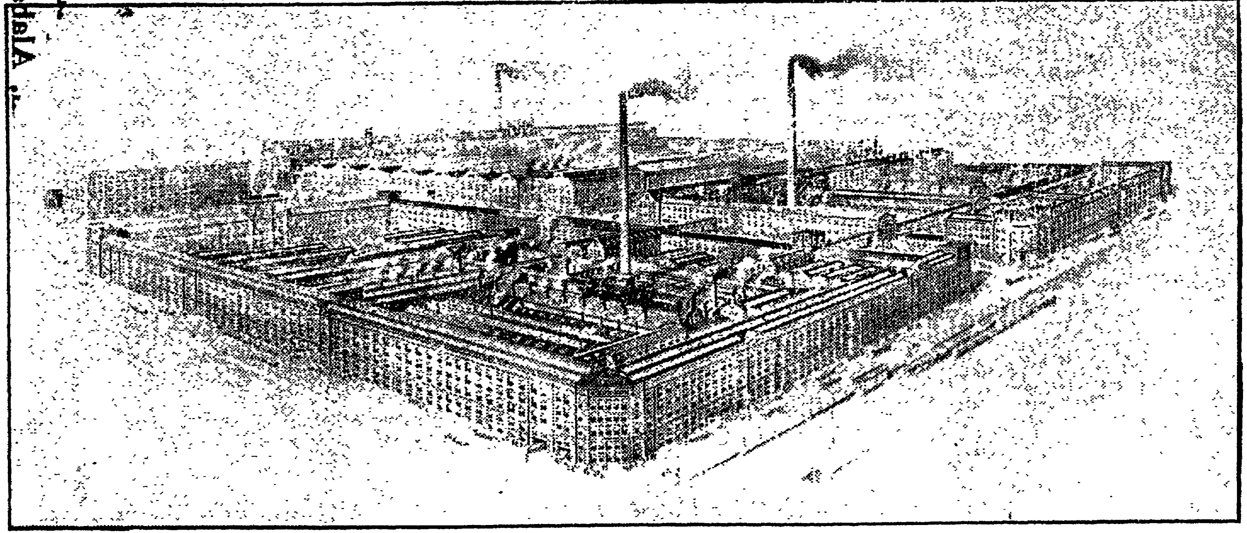

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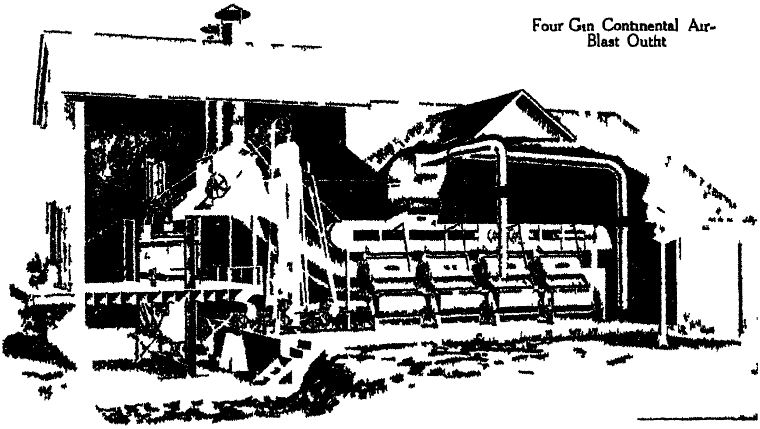

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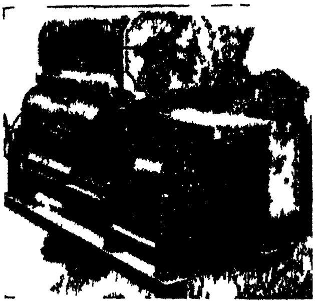

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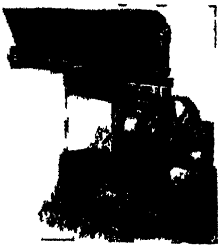

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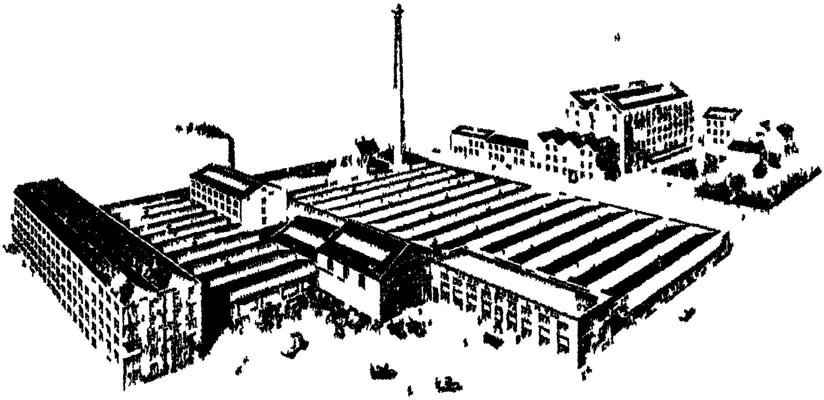

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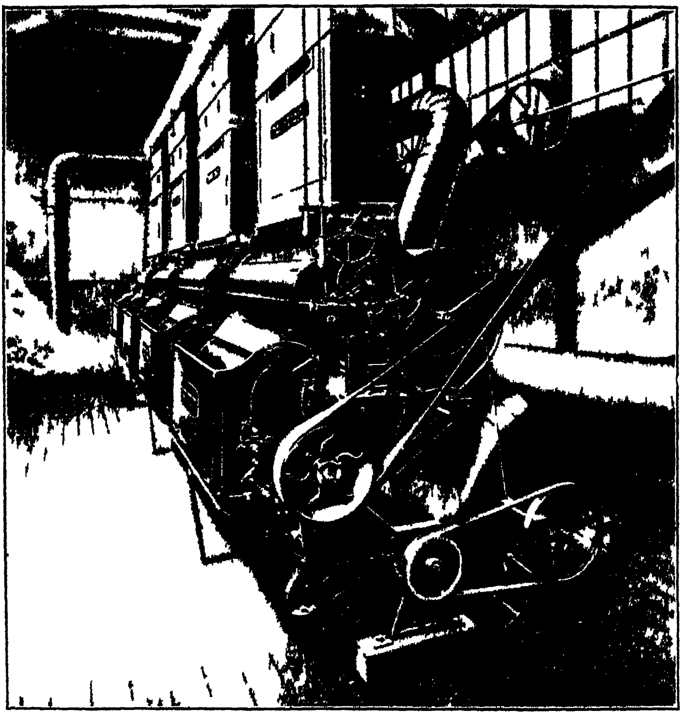

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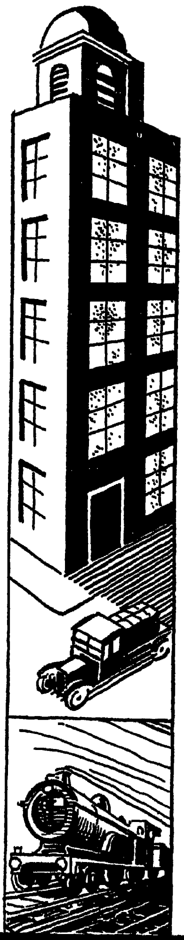

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COUNT JEAN DE HEMPTINNE

Newly elected President of the International Cotton Federation

INTERNATIONAL COTTON BULLETIN

No. 32. Vol. VIII, 4. July, 1930

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COMMITTEE'S COMMUNICATIONS.

Extracts of the MINUTES of the MEETING of the INTERNATIONAL COTTON COMMITTEE, held at the Grand Hôtel et des Iles Borromées, Stresa, Italy, on Monday and Tuesday, 5th and 6th May, 1930.

Present · Messrs F HOLROYD, President (in the chair), Wm Howarth, Lieut-Col N Seddon Brown, F A Hargreaves, Dr W Bohm, Joh Elster, John Syz, Joan Gelderman, Count J de Hemptinne, Dr G Mylius, Robert Brasseur, R A de la Beaumelle, Dr A Zucker, Roger Seyrig, Caspar Jenny, Dr Silvio Soldini, Arthur Kuffler, Arno S Pearse, L Assi, Norman S Pearse, John Pogson

By invitation, the following spinner members of the Joint Egyptian Cotton Committee were also in attendance Messrs W H Catterall, Wm Heaps, G Berry, F Wright, Otto Pick

Apologies for non-attendance were received from Messrs K Shimada, K E Palmen, Santiago Trias, Holger Sebbelov, H P Tavena, Sir Thomas Smith, Sir Ness Wadia, Otto Lindenmeyer, A E Hankanson, M Lavonius, Ed Blikstad, Robert von Szurday

The Chairman, in opening the meeting, welcomed the representatives of the various countries and expressed his delight at the renewal of acquaintances of such a large number of delegates which he considered was a compliment to the Italian Association, whom he thanked for their hospitality and arrangements for the meeting Dr Mylius briefly responded

MINUTES.

The minutes of the Barcelona and Paris Committee meetings were read and confirmed.

COTTON PROPAGANDA.

The President reported upon the steps which had been taken in England since the passing of the resolution at Barcelona on the question of publicity and propaganda to increase the consumption of cotton goods. The subject had been taken up enthusiastically and as a result of the Lancashire Cotton Fair, held early in the year which was attended by approximately half a million people a special Committee had been appointed to organize a National Cotton Week which had commenced on May 5, and was inaugurated at a meeting in London on May 1, being attended by Cabinet Ministers and prominent members of each of the other two political parties. The organization Committee was being financially supported by all sections of the industry, which as a preliminary had arranged for the following propaganda being undertaken:

Provision of posters for the shop windows of retailers (20,000 in number) throughout the country.

Advertising on a large scale in the leading newspapers, special press articles dealing with the many phases of cotton, its advantages over other fibres, etc., were prepared and broadcasted amongst all the newspapers, which reproduced them in large numbers, or wrote new articles on the basis of information supplied by these articles.

The movement was being warmly supported by the workers who in various cotton districts were organizing cotton dances at which garments made from cotton were being worn, while prizes were being offered for the most stylish and original dresses displayed.

Mr Holroyd stated that these efforts only represented a beginning which would, it was expected, continue for some time to come.

At this stage Dr SCHLEICH, Cotton Propaganda Expert for Germany, joined the meeting and addressed the Committee on the course of action that was being taken in that country to encourage the use of cotton goods.

He referred to the explanations given by Dr Bohm at the Barcelona Cotton Congress, which contain full details of the German propaganda programme. Since that time a special committee has made great efforts to popularize the propaganda idea within the different groups of the German cotton industry, as well as with textile papers, drapers, and others. It may be stated that there is now a general sympathy in favour of cotton propaganda, and it is likely that in the very near future the Barcelona programme will also be effectively inaugurated in Germany. No doubt it would have been possible to arrange shortly after the Congress Cotton Weeks, Window Displays, or Exhibitions of cotton goods at low purchasing prices, but as the German public mind and customs differ from those of the English people, the methods to be used will also have to be different. Whilst Dr Schleich admired the progress achieved with cotton propaganda in England, he stated that the task of the German campaign aims at securing a lasting revival of the cotton industry, and not merely a transitory improvement of actual business. As a first effort, Germany had begun to study the new uses of cotton in order to make cotton goods more attractive to the public from the fashion, pattern, printing dyeing, and other points of view. In their discussions they had concentrated their attention chiefly upon the industry itself to make attractive goods which would appeal to clients, and secondly by enlisting the aid of the Press in proclaiming the virtues of cotton by means of special textile articles.

The next step will be an extensive appeal to public opinion by means of all kinds of propaganda, such as advertising, exhibitions, mannequin parades, movies, window displays, and so on. The textile papers, especially the *Textil Woche* and the *Textil Zeitung* have done very useful propaganda work. The Committee hope that, working together with the newspapers, journals and drapers organizations, they will obtain lasting success.

The difficulty which has still to be overcome is the collecting of money necessary for the carrying out of the whole programme. The Committee are of opinion that it will be necessary to establish a guarantee fund to cover a period of three years and they are now considering ways and means of raising the necessary funds. A tax on every bale of cotton used in Germany had been considered, and they were not unhopeful that in this manner the necessary financial aid would be forthcoming.

Mr R SEYRIG (France) said the cotton industry of the world was thankful for the efforts that had already been made in England to further the use of cotton goods. He thought, however, that France could not do a great deal in propaganda on behalf of cotton, because if they did so countermoves would probably be made by manufacturers of other textiles such as rayon, silk and wool, and their cotton propaganda efforts might thus be neutralized.

Mr HOLROYD (England) said that if the other textiles mentioned by Mr Seyrig became the hand-maidens of cotton it would be all to the good of cotton production.

Lieut.-Col N SEDDON BROWN (England) expressed the view that in England they had taken the greatest care in organizing their cotton campaign, and he was convinced that rayon was an ideal filament to work side by side with cotton, for it would no doubt assist in producing still more attractive goods with cotton as the principal foundation. He expressed the hope that the efforts being made to support cotton would not be spasmodic and that they would be of a sustained character. For the information of other countries he made the following suggestions for a more permanent propaganda programme —

(*a*) To start a shopping week and offer prizes to shopkeepers for the best displays of cotton materials in their windows.

(*b*) Advertise the shopping week in the local press.

(*c*) Organized competitions for needlework of cotton material bought during the shopping week, the purchase of which could be attested by certificate from the shopkeeper.

(*d*) The making of all kinds of garments in the home. To encourage the making of these garments out of cotton fabrics, for which prizes should be offered.

(e) At the end of two or three months, civic authorities might arrange a function at which articles sewn and made by hand or machine might be displayed and prizes distributed by the civic authorities for the best results.

(f) Such efforts as indicated might be renewed and followed by cotton dances, tableaux, pageants, etc.

Lieut.-Col. N. Seddon Brown added that if organization such as this could be undertaken, starting in the spring and keeping up the pressure until the autumn each year, lasting good for the cotton industry would be the reward. By such a system only could we keep the merits of cotton before the public. One should not overlook the fact that cotton produced the most hygienic and cheapest form of clothing in the world, and the scientific aspect of cotton was being fully explored in England. In his opinion there were still many new uses to which this valuable fibre could be put, and the question was how to bring them out. Money would be required for this purpose. He was, however, firmly convinced that if substanial prizes could be provided for the discovery of novel uses of cotton, these novel uses would be found.

Count J. DE HEMPTINNE (Belgium) thought that France could help very materially in cotton propaganda, seeing that it was the centre of ladies' fashions. He was pleased to note that ladies were wearing longer dresses, and thought that much good might be done by impressing upon dressmakers and clothiers the value and usefulness of cotton clothing.

Mr. WM. HOWARTH (England) emphasized the fact that, on the authority of eminent scientific medical men in England, it had been proved that the only method by which clothing could be properly cleansed was by means of boiling, and cotton was the only fibre substance that would endure boiling.

Mr. A. KUFFLER (Austria) referred to the question of prizes for the discovery of new uses of cotton suggested by Lieut.-Col. N. Seddon Brown, and said he hoped that such a movement would not be confined to any particular country, but would be made international in its scope. He therefore suggested that a fund be established by the International Cotton Federation for this and other propaganda.

The GENERAL SECRETARY intimated that he had approached the Egyptian Government with a view to helping forward cotton propaganda, and it was expected that a sum of £2,000 would be forthcoming from this quarter.

Dr. SCHLEICH referred to the artificial silk industry of Germany having gained prominence by intensive propaganda, and spoke of an agreement which had been arrived at between the cotton and artificial silk industries of Germany to assist each other in friendly co-operation in this propaganda campaign, as they had realized that their interests are largely identical, or at all events interdependent.

Mr. R. SEYRIG (France), answering Count de Hemptinne, stated that the French cotton industry was favourable to the international movement of cotton propaganda, and would do its utmost to induce the dressmakers and other masters of fashion to display more frequently cotton goods, but they felt that they were in danger of incurring the antipathy of manufacturers of other French textiles, and therefore they had to proceed cautiously. The cotton industry of France is not as important a national asset as it is in England.

Dr. G. MYLIUS (Italy) said that they had taken up the matter seriously, and had appointed two sub-committees to organize the work. The first step taken had been to get in touch with the Italian Dressmakers' Association, who had arranged mannequin parades at the Industrial Fair in Milan, which had been a great success, and produced more business in cotton dresses. They were endeavouring to copy in cotton goods the fashion set by the Italian silk industry, and experts had already been engaged to study new uses of cotton, and some publications on the subject had been issued. In a word, Italy was doing all it could to help in the revival of the cotton industry.

Dr. A. ZUCKER (Czecho-Slovakia) said that his country was following the example set by other countries.

The reports generally on the subject were regarded as very encouraging, and on the motion of Mr. Wm. Howarth, seconded by Mr. Arthur Kuffler, the following resolution was unanimously adopted:

Cotton Propaganda Fund.

> "That a fund be created by the International Cotton Federation for the purpose of international cotton propaganda, and particularly for the encouragement of new uses to which cotton can be applied.
>
> "That this Committee learns with satisfaction of the intention of the Egyptian Government to contribute the sum of £2,000 towards this object.
>
> "It heartily appreciates and thanks the Government of Egypt for this generous gesture, and expresses the hope that the Governments, public authorities, as well as trade organizations in all countries interested, will emulate this worthy example, and thus make their contribution towards a restoration of the world's cotton industry."

RECORDING NEW TECHNICAL INVENTIONS.

Dr. Bruno Canto (Italy) had submitted the opinion that the International Federation should examine in a special mill all inventions of a mechanical or chemical nature affecting the cotton industry. After consideration of the suggestion it was felt that such investigations were somewhat beyond the scope of the International Federation, but Mr. Howarth thought that what was being undertaken at present by the Textile Institute at Manchester might be of some considerable help. Mr. Howarth explained that the Textile Institute examines at considerable expense any invention that is submitted to that organization, and publishes a report on these investigations in its monthly journal, the subscription to which is £2 2s. 0d., and was open to anyone who cared to subscribe this trivial amount.

The Secretary was requested to hand the names of the affiliated associations and of the International Committee to the Textile Institute, Manchester, in order that they might circularize them.

ARBITRATION IN CASE OF DIFFERENCE IN QUALITY OF c.i.f. AMERICAN COTTON PURCHASES.

Dr. Bruno Canto had submitted the following statement to the Committee, which had been circularized before the meeting:—

"One of the hardships which the Continental spinner has to face is the 'possible' difference in the quality of the cotton which he may receive, as compared with the cotton he had ordered and expected to receive.

According to the present arrangements in the cotton trade, the supplier has no interest at all in giving good value to his customer, with the exception of the desire to secure future preference of orders on the part of the purchaser.

In case of arbitration, even at the worst, the vendor only has to indemnify the purchaser for the real value of the difference in the cotton supplied.

The serious point, however, is that the arbitrator does not even grant this just difference.

This occurs, above all, in the case of cotton with irregular fibres, because in this case the samples examined may appear quite regular, whilst the remainder in the bale is not so. In selling such cotton for a higher classification to the true average of the entire lot, the supplier has practically always the certainty of not having to pay the allowance really due. The fact is that, if the spinner buys some strict middling 1 in., and pays, for instance, 70 points premium, in comparison with a $\frac{15}{16}$ in., he does not receive 70 points at the arbitration if the supplier delivers him what is correctly sold for $\frac{15}{16}$ in. In the consignment there are always bales which a clever arbitrator can cause to be accepted as being 1 in., or at least more than $\frac{15}{16}$ in., so that there is practically no allowance.

But, even if it were not so, it is still an absurd thing that the spinner should have to accept anything that pleases the vendor, being allowed to charge the difference in the commercial value only, although this difference is often negligible in proportion to the damage done to the manufacturer by not having the needed goods at his disposal.

It may be said that the best method of defending oneself against dishonest vendors is to buy from honest firms only. The reply to this argument is:—

(*a*) In that case it will be just as well to abolish the right of arbitration.

(*b*) Competition would be too limited, the number of firms who *always* supply what they sell being very small.

It would, therefore, be logical to introduce the remedy of a penalty to be imposed on the vendor. This penalty has the effect of putting a brake on the greediness of the vendor, and of compensating, in part at least, the spinner for the heavy damage caused to him by finding himself with cotton on his hands that is not suitable for his purpose.

This penalty could consist, for instance, of an allowance equal to twice the real difference in the quality, in every case where such difference exceeds a certain limit to be fixed.

It may be objected that there is nothing to prevent the stipulation of such a clause with the seller, but the fact is that it would hurt feelings, and owing to this the seller will prefer giving up the business.

If, instead, the clause of a double allowance were to be declared an official one, there would be no reason for complaints.

Contracts stipulating single allowance could still be made, but would form the exception, and would have to be specified every time."

After a long discussion, the following resolution was unanimously adopted:—

> "This meeting endorses the following resolution, adopted recently by the Italian Cotton Spinners' Association, and forwarded to the American Cotton Shippers' Association, Memphis, Tenn:-
>
> 'In addition to the allowance given by the arbitrators for any difference in quality, the seller shall pay to the buyer a penalty of 2 per cent. of the invoice amount on all bales which are declared to be more than one American universal standard grade below the quality sold, provided that the number of such bales is more than 5 per cent. of the entire lot.
>
> In addition to the arbitration allowance and the 2 per cent. penalty provided in the preceding paragraph, the seller shall pay a further penalty of 4 per cent. of the invoice amount of the whole lot when it has been established by the arbitrators that the average quality of the whole lot is two American universal standard grades below the contract quality.
>
> The above penalties shall also apply to staple deficiency, and to this effect a difference of $\frac{1}{16}$ in. in the length of staple shall be considered as equivalent to a difference of one grade, and penalties shall accordingly be assessed.
>
> In the application of the above penalties the allowance awarded separately by the arbitrators for grade and staple shall not be accumulated.'
>
> "This meeting is also in agreement with the practice existing in France, where spinners have undertaken to purchase c.i.f. cotton only from such houses which are able to exchange bales in cases where, after arbitration, the spinner finds that the difference between the quality ordered and that delivered is too great."

THE TOO FREQUENT ISSUE OF NEW SETS OF DESIGNS OF FANCY GOODS.

The following statement had been circularized prior to the meeting amongst the members of the Committee:—

(A suggestion for International Action by the Association of German Coloured Goods Manufacturers and Allied Industries and by the Association of German Shirt Manufacturers.)

" Since the war there have gradually developed conditions in the issue of new designs for men's shirting materials which are causing enormous expenses to the industry. Whilst before the war it was the custom to issue new sets of patterns only once a year, generally in the spring, to which at times, in the autumn, some additions were made, we are now face to face with the obligation to bring out every two or three months new designs, so that the life of all new sets is limited to two or three months. It is evident that such frequent issue of designs must have a damaging influence on the rentability of the manufacture of men's coloured shirting materials. The weaving mills suffer great losses because they are no more able to sell their goods at normal prices; as soon as new sets appear they are forced to dispose of these goods with a heavy loss. The same effect obtains in the making-up trade of shirts, as everyone has to have in stock designs which soon become old-fashioned in consequence of the appearance of new sets, and thus they also are forced to sell such stocks at ridiculous prices.

The costs of getting up designs are in themselves sufficiently high. It has been calculated that if only one issue of new designs could be omitted there would be a saving in the sampling of 25 per cent. These economies would be obtained by a smaller use of the woven material for patterns, by a smaller purchase of designs and sketches, by reduced expenses in the weaving of patterns, by the use of less pattern cards, etc., and mainly by the fact that a reasonable number of issue of designs is more remunerative because the designs can be manufactured and sold in larger quantities; furthermore the different mills will be running fewer qualities, and thus be able to produce cheaper. Lastly, the necessary technical arrangements can be planned for a considerable period ahead. In consequence of the frequent getting-up of new designs a large number of preparatory machines and looms are taken from the regular course of manufacture, as they are being devoted to the making of patterns. This, of course, increases the cost of production, as it reduces the output of the mill. The commercial section of the mill has also additional expenses, as with the issue of new designs special propaganda and preparation become imperative. Finally, the activity of the traveller or agent is interfered with, as he loses a great deal of time in showing all these new collections, and thus he cannot devote the usual hours to his normal selling activity.

The quickly passing-out of designs does not only cause an actual loss due to the selling-off at ridiculous prices of so-called 'old' designs on the part of the manufacturer and the maker-up, but the damaging effect of too many new collections is also a depreciation of the entire coloured shirting trade.

We all know that the purchasing power of large numbers of the public has been reduced since the war and that demand does not correspond anywhere near to the supply. This surplus supply probably exists throughout the world. With a view to getting customers to buy, low prices are frequently offered for new designs of high-class zephyrs or poplins and for the shirts made from these articles, which include from the very start the loss that is anticipated to be made when finally they are being superseded by other designs.

The retail trade, as well as the final consumer, regards all offers as a sign to pay only selling-off prices even for high-grade goods. The retailer asks from the maker-up, and demands from the manufacturer, designs and qualities at prices which are to enable him to compete with those who announce the selling-off of goods in circulars and advertisements, without however pointing out the reasons for their astounding cheapness (designs which have become old-fashioned and 'stale' in consequence of the issue of new sets).

These conditions, which not only cause the weaver considerable harm but also affect in the final stage the operatives, are due solely to the too frequent issue of new designs. Therefore a change in the present method would not only be of advantage to the maker of coloured shirting material, but also to the making-up trade and to other sections.

It is no doubt due to the frequent change of fashion that since the war so many issues of designs in shirting materials have taken place. It must, however, be admitted that the makers of shirting materials and the making-up trade could exercise a considerable influence on the tendency of fashion if they could succeed in coming to *a uniform decision to issue only once a year, at the most twice a year, new sets of designs.*

The German coloured goods weaving mills and the German making-up trade of shirts have for the last two years devoted some attention to this very important problem. They have come to the recognition that the change of the present conditions, in view of the international competition, would only be possible if the manufacturers and the makers-up of shirts in all the important countries of the world would combine by adopting a uniform agreement to introduce in all countries the same limitation in the issue of new designs.

It is for all concerned, namely, for the manufacturer, the maker-up, and the retailer, of importance that the periods for the issue of designs are limited and predetermined on an international basis; there should not be more than two per year. At the present time most of the international coloured goods manufacturers place in April and May their new designs on the market, but some, particularly the English mills, bring their designs out only in August. The makers-up are therefore not in a position to know whether, and how much, they must leave open for the designs that may appear after May. There should be no difficulty in coming to an agreement on this point.

This is a problem of great importance which affects the entire cotton industry of all countries, all the more so as international competition in cotton goods, generally speaking, seems to have become more acute from year to year, with a consequent result that the margin of profit of all is being reduced.

Therefore, any measure that aims at improving the profit of the industry should deserve the fullest attention, and for that reason we recommend the problem for a general limitation of the issue of new designs in men's shirtings to the close study and action on the part of the cotton manufacturers of the world."

The following resolution, on the motion of Lieut.-Col. N. Seddon Brown, was unanimously agreed to:—

"This Committee is of opinion that the cost of cotton fancy cloths to the public is unnecessarily increased by the excessive number of designs that are issued; the Committee recommends that the attention of members of affiliated associations be drawn to this matter, and suggests that the greatest possible economy be exercised in the production and quantity of such designs."

RE-ADMISSION OF BOMBAY MILL OWNERS' ASSOCIATIONS.

On the motion of the Chairman, it was unanimously resolved that the Bombay Mill Owners' Association be re-admitted to the International Cotton Federation.

The Committee then adjourned for luncheon.

REPORT ON THE SECRETARY'S RECENT INDIAN JOURNEY.

On resuming the meeting, Mr. ARNO S. PEARSE, the General Secretary, gave an exhaustive verbal account of his recent visit to India, which led to a most interesting discussion, following which he was warmly thanked for the information he had presented. Mr. Pearse stated that the material he had collected would be published in July in a book that would be issued to all the members of the International Federation.

ABANDONMENT OF DOUBLE SHIFTS IN THE COTTON MILLS OF THE WORLD.

This was one of the subjects raised in Mr. Arno S. Pearse's report on India, as the Indian Government has interpreted the working of two shifts as being an "unfair" advantage to the Indian cotton industry, and this has been the main reason of the increased rates of import duties on Indian goods.

After a long discussion, which extended to the meetings on both days, it was decided that each representative should convey to his own organization the personal expression of opinions expressed at this meeting, and that each association should, in the light of recent events, deal with the matter and submit the considered opinion of the association to headquarters for the autumn meeting (Brussels, October 13).

PROPOSED JOINT AMERICAN COTTON COMMITTEE.

The GENERAL SECRETARY of the International Federation read the following correspondence which had passed between the International Federation and the Secretary of the Department of Agriculture, Washington, on the above subjects, and after some discussion further consideration of the question was left over until the next meeting of the International Committee in October, 1930.

Copy of letter sent by the President of the International Cotton Federation to Mr. Arthur W. Hyde, Secretary of Agriculture, Washington, D.C., on December 6, 1929.

Dear Sir,

I am informed by your representative in England, Mr. E. A. Foley, that the suggestion which I made at the recent

Barcelona Cotton Congress to the effect that we would welcome the establishment of a special committee for dealing with all questions relating to American cotton on the same lines as our existing Joint Egyptian Cotton Committee would meet with your approval. I therefore enclose a copy of the rules which govern the working of the Joint Egyptian Cotton Committee.

You will see that the Egyptian Government appoints all the members of the Egyptian section, of which the present President, Ahmed Abdel Wahab Bey, is a permanent official of high standing in the Finance Department, which has a great deal to do with Egyptian cotton. Dr. W. L. Balls is not only the Chief Botanist to the Department of Agriculture, but he is probably the greatest scientific expert on cotton. Agriculture as a whole and farmers are represented by the Director of the State Domains, the Director of the Royal Agricultural Society, and the General Secretary of the General Agricultural Syndicate (a farmers' organization). Then there are two members of the Alexandria General Cotton Produce Association, which is an organization of cotton exporters.

The constitution of the spinners is such as to give each of the large consuming countries one delegate, but as England has a preponderating consumption of Egyptian cotton, three delegates have been conceded to her.

In order to train the necessary successors in the work of the Committee, provision is made for substitute members of the delegates; they may attend meetings, together with the delegates, and be consulted, but they have no vote.

Whatever resolutions are adopted are merely in the form of recommendations. Voting hardly ever takes place, as experience has shown that decisions must be arrived at by common accord.

There is an infinity of subjects which suggests itself to me for the consideration of such a Joint American Cotton Committee; for instance: improvement in the baling—uniform tare—standard of humidity—exchange of opinions as to the requirements of the spinners—prevention of the falling-off of quality (stopping the spread of half-and-half)—improvements in the ginning—marketing facilities—cotton contracts, etc.

Though the Cotton Exchanges are not yet members of the International Cotton Federation, provisions are being made for their associate membership, and we shall probably have the most important European Cotton Exchanges next year as such members.

According to my opinion, the American Government should appoint the American members and we would represent the European and Asiatic section. Probably the American section would contain some members of the Federal Farm Relief Board, The Cotton Co-operatives, the American Cotton Shippers' Association; but care must be taken that the Committee does not become too unwieldy.

As the American cotton manufacturers have not yet seen fit to become members of our international organisation, you may have to appoint one or at the outside, two American cotton manufacturers

Our next International Cotton Committee meeting takes place towards the end of April or beginning of May, and I should be pleased if by that time you could let me have your views Perhaps it may even be desirable that you send a delegate to this meeting for the purpose of arriving at the outlines of the rules that are to govern such a Joint American Committee, and to fix the first meeting of this body

Yours faithfully,

(signed) F HOLROYD, *President*

P S—The rules of the Joint Egyptian Cotton Committee are set out on pages 709-11 of the accompanying INTERNATIONAL COTTON BULLETIN, Vol IV, No 24

Copy of letter addressed by the United States Department of Agriculture Washington, D C, to Mr E A Foley, Agricultural Commissioner, American Embassy, London, on November 7, 1929

Dear Mr Foley,

Further reply to your letter of September 28 has been delayed until the suggestion of the International Cotton Federation that the Department be associated with the Federation in an American Cotton Committee could have rather careful consideration While the feeling towards the committee idea is not unsympathetic, it seems to be the conclusion that the designation of American members might perhaps better rest with some of the groups in the industry than with the Department

As you know, there are three general sections of the industry interested in raw cotton in this country, namely, growers (including the co-operatives), shippers and manufacturers It has been suggested that under the circumstances the Federation might wish to approach one or more of the organisations within these groups directly, and such a course I believe would be agreeable to the Department If, however, the Federation would prefer to have the Department transmit its invitation to appropriate groups, the Department would be glad to be of this assistance In the latter case it might be desirable for the Federation to address a letter to the Department which could serve as the basis for this action

From your letter it is inferred that the Federation would be interested in contacting only with growers If this understanding is not correct the Federation could in its letter indicate more specifically which groups it would like to have included

Yours very truly,

(signed) NILS A OLSEN, *Chief of Bureau*

Mr E A Foley, the American Commissioner, London, called at the Head Office in Manchester and suggested that we rewrite our letter according to their suggestions as per their letter of November 7, 1920

Mr Foley thinks that the first meeting should take place in March 1931, after the Standards meeting at Washington

ATTENDANCE OF REPRESENTATIVES OF THE INDIAN CENTRAL COTTON COMMITTEE AT FUTURE CONGRESSES

It was unanimously resolved that direct invitations be extended to the above Committee to send representatives to future International Cotton Congresses, and that arrangements be made for sectional meetings dealing with Indian cotton at the next International Cotton Congress at Paris

Dr ZUCKER suggested that a subject for consideration by this sub-section was the difficulties of spinners arising out of the present Indian "Futures" Cotton Contract

ASSOCIATE MEMBERSHIP.

The following rules to permit the enrolling of Associate Members to the International Federation had been unanimously agreed upon by the Barcelona Cotton Congress —

> Rule 1 Cotton Exchanges, Bleachers', Calico Printers', Textile Machinists' or other allied associations are eligible for associate membership with the International Cotton Federation, subject to their acceptance by the Committee or Congress
>
> Rule 2 An annual levy of £1 1s per individual member comprised in such associations shall be paid, but where the members number less than 25 the total of the annual levy for the association shall be 25 guineas (£26 5s)
>
> Rule 3 Such affiliated associations will receive for each one of their individual members a copy of the quarterly publication of the INTERNATIONAL COTTON BULLETIN
>
> Rule 4 Associate members will be entitled to attend the International Cotton Congresses, but they will not have a vote They may suggest to the International Committee subjects for the discussion at either Congress or Committee meetings
>
> Rule 5 Associate membership does not entitle to direct representation on the International Committee

This addition to the Statutes was endorsed It was pointed out that these associate membership rules did not apply to cotton spinners or manufacturers, who would have to become full members, and as a number of cotton spinners are associate members of one or the other Cotton Exchanges, it was agreed that Cotton Exchanges should be liable only for the contribution of those member firms engaged in the selling of cotton

The Secretary was instructed to approach the various organizations with a view to enrolling them as associate members

INTERNATIONAL LABOUR BUREAU ENQUIRY INTO THE COTTON TEXTILE INDUSTRY.

At this stage of the proceedings Mr OLIVETTI, President of the Italian Cotton Association, attended, and after receiving a welcome from the Chairman, gave an account of the proceedings at Geneva in connection with the proposed International Textile Enquiry into the cotton, wool and worsted industries

A discussion ensued, and the Committee recommended its constituent bodies to supply the information asked for by the International Labour Bureau of the League of Nations, only on the condition that all industrial countries made full returns, and that the correctness of the same should be vouched for by the respective Governments, however, the representatives of several Continental countries, in particular those of France, declared formally that they could not see their way to supply the information

INTERNATIONAL STATISTICS.

The GENERAL SECRETARY read the following letter from Mr H G Hughes, Director of the Cotton Trade Statistical Bureau, Manchester, relating to the discussions which took place under the auspices of the International Chamber of Commerce in Paris on the above subject

> "At a meeting of the Consultative Committee on Cotton Statistics, held at the International Chamber of Commerce in Paris, on March 18, it was decided that the draft report before the meeting should be revised in the light of the discussion that had taken place, and circulated to members of the Committee, with the request that they should take steps to obtain the views of their national associations upon the proposals outlined in the report. It was hoped that this might be done in time for the report to be further considered during the meetings of the International Federation at Stresa in May
>
> I understand that a number of countries and interests, whose representatives were not at the Paris meeting, wish to comment on the original draft, of which, of course, they received copies Unfortunately, their detailed suggestions have not reached me, and, after consultation with the Chairman of the Committee, Mr Holroyd, I thought I had better inform you of the position and explain why it has not been possible to revise the report in time for consideration at Stresa
>
> It has been proposed that a further meeting of the Cotton Statistics Committee should be convened some time during the summer, in order to enable countries who had no official spokesman at the last meeting, and particularly the United States, to express their point of view"

Under these circumstances no further action was decided upon

The meeting was then adjourned until 9-15 a m on the following day

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At the adjourned meeting of the Committee, on Tuesday, May 6, the following subjects were discussed.—

PARIS CONGRESS SUB-COMMITTEE 1931.

The following were appointed as Sub Committee to make necessary arrangements for the Paris Cotton Congress in 1931 Count J de Hemptinne Dr W Bohm, M R A de la Beaumelle, Monsieur Pierre de Smet Arno S Pearse, Norman S Pearse, with power to co opt other members on the Sub Committee, and that their report be considered at the next meeting of the International Committee in October

SUGGESTED SUBJECTS FOR CONSIDERATION AT NEXT CONGRESS.

The following subjects for the Paris Congress were tentatively considered

(1) The causes of the depression in the world's cotton industry since the war and remedies

(2) Cotton valorization

(3) The effects of social legislation on the cotton industry of the various countries

(4) East Indian cotton The "Futures" Cotton Contract

The Chairman invited each country to communicate to the Central Office any subject which they considered ought to be discussed at the Congress

AMERICAN TOUR 1930.

It was deemed desirable that a visit should be paid to the United States of America this year on the same lines as last year, and Mr Norman S Pearse was appointed to undertake this journey

ELECTION OF PRESIDENT AND VICE-PRESIDENT.

On the suggestion of Mr F Holroyd, the following rules relating to the election of President and Vice President of the International Federation were adopted

> "The Committee elects its officers from amongst its own members
>
> The offices of President and Vice President are to be alternatively held by different persons of the International Committee for a period of two years, but in view of England's position in the world's cotton industry, the President will be elected every second year from amongst the English representatives of the International Committee, and whenever the Presidency is held by a representative from another country the English representatives will appoint from amongst their numbers the candidate of the Vice Presidency"

Mr F HOLROYD intimated that he had decided to resign the office of President, which he had held for five years, as he thought it advisable that this important honour should be shared by other members of the committee who had worked for years in the interest of the International Federation, he added "I have great pleasure in moving the election of Count de Hemptinne as President of the International Federation We could not have a more competent gentleman to hold the position I feel that his wide experience and knowledge will enable him to fill the office e International Committee and the Spinner members of the Joint Egyptian Cotton Committee, at Stresa, May 5th, 1930

Arno S Pearse G Berry F Wright W Heaps J Gelderman S A Soldini
J Pogson W H Catterall G Myliu A Zucker C D Delfino R A de la Beaumelle
Eister W Bohm W Howarth Lt Col N Seddon Brown R Seyric C Jenny R Brasseur N S Pearse L As i
Kuffler J Syz F Holroyd Count J de Hemptinne F A Hargreave

with credit to himself and satisfaction to the International Federation."

Dr MYLIUS said: It is a great pleasure for me to second the nomination of Count J. de Hemptinne, not only as an old friend of the International Federation, but owing to my great opinion of his ability to preside efficiently over the affairs of such an important organization. The resolution was put to the meeting and carried unanimously.

Count J. DE HEMPTINNE then took the chair and in reply said: I thank you very cordially for the high honour which you have conferred upon me just now by electing me President of the International Cotton Federation. You know that I have hesitated considerably in coming to the decision whether I should accept this very difficult position or not, particularly at a time of an extremely difficult crisis of the cotton industry; it is indeed a task to occupy this chair for which I fear I hardly possess the necessary qualifications. I have accepted solely because I know for certain that I may count upon your hearty co-operation and that you will never refuse to assist me with your valuable, frank and friendly advice. The position to which you call me has been eminently filled by all the predecessors, namely Messrs. Holroyd, Sir Herbert Dixon, John Syz and the late eminent Sir Charles Macara.

VOTE OF THANKS TO RETIRING PRESIDENT

Continuing, Count J. de Hemptinne said: I have had no opportunity to examine the reasons why Mr F. Holroyd, whose very able chairmanship we have admired so frequently during his five years of office, has arrived at the decision to hand in his resignation. I feel convinced and have the mandate of everyone here to express to you, sir, our high admiration for the efficient manner in which you have conducted the business connected with the chairmanship of the International Federation. I am positive that during your term of office the reputation and prestige of the International Cotton Federation has increased enormously, and I have the pleasure to convey to you the decision of your colleagues on the Committee that as a token of their high appreciation of your services this vote of thanks be inscribed in a permanent manner, in the form of a suitable souvenir.

In closing my few remarks I take the liberty of exhorting you to attend assiduously to our tasks, by concentrating all your efforts in order to find a solution of the very formidable and almost catastrophic situation of the industry. I also appeal to you to continue the very harmonious feelings which have always characterized our meetings.

I now propose that Mr F. Holroyd be nominated first past president of our organization.

Mr WILLIAM HOWARTH seconded the resolution proposed by Count de Hemptinne, and being put to the meeting it was unanimously carried.

Mr HOLROYD moved and Mr HOWARTH seconded the appointment of Mr F. A. Hargreaves as Vice-President of the International Federation.

Mr F A HARGREAVES cordially thanked for the honour conveyed to him and his association by the invitation to act as Vice President, but he regretted that owing to reasons of health he was unable to accept the position

On the motion of Mr Holroyd, seconded by Mr Howarth Lieut Col N Seddon Brown was unanimously elected Vice President of the International Federation

Lieut Col N SEDDON BROWN acknowledged the honour conferred upon him and accepted the office

NEXT COMMITTEE MEETING

It was decided that the next meeting should be held in Belgium, in October next

A vote of thanks was passed to the Chairman, and the meeting concluded

It was unanimously resolved that Mr Arno S Pearse be appointed Expert Adviser to the International Committee at an annual fee of one hundred guineas

LE COMTE JEAN DE HEMPTINNE EST ELU PRESIDENT

Plusieurs journaux ont paye hommage au nouveau President de la Federation Internationale Cotonniere et nous en citons un article du 'Bien Public,' Gand date le 9 mai 1930

Le Comite de la Federation Internationale Cotonniere, qui s'est reuni a Stresa le 5 mai, avait a proceder a la designation d'un president en remplacement de M Frederic Holroyd dont le mandat expirait cette annee Cedant aux instances unanimes dont il etait l'objet, le Comte Jean de Hemptinne a accepte d assumer la presidence de la Federation Internationale Contonniere Ce choix honore non seulement le nouvel elu, mais aussi Gand et la Belgique, il est le digne couronnement d'une eminente et remarquable carriere

Un des principaux succes de celle-ci fut la creation et l'organisation de l'Association Cotonniere de Belgique Vers la fin du siecle dernier, une concurrence apre et epuisante en etait arrivee a menacer l'existence même de la filature de coton belge Cette crise grave devait pourtant être feconde, puisqu'elle aboutit le 4 octobre 1899, a la Constitution de l'Association Cotonniere de Belgique Par la fixation des prix, l'unification des conditions de vente et la limitation de la production, le nouveau groupement parvint a diminuer les effets de la crise et a pallier aux inconvenients d'une concurrence irraisonnee

Cette action bienfaisante continua a se manifester durant les annees qui precederent la guerre Les crises n'epargnerent pas

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* It has since then been decided that this meeting will take place on Monday and Tuesday, October 13 and 14, 1930 at the Hotel Astoria Brussels

l'industrie cotonnière, mais on parvint à en atténuer les conséquences. L'on dut plusieurs fois recourir au chômage. Celui-ci était tantôt obligatoire, tantôt facultatif; dans ce dernier cas, une indemnité était remise aux usines qui chômaient ou une redevance payée par les usines qui continuaient à travailler.

L'Association n'avait pas seulement le souci de pallier aux crises, elle centralisa les mesures de défense de l'industrie cotonnière toute entière.

Jamais son rôle ne fut peut-être plus important qu'au lendemain de la guerre. Ruinée et dépouillée par l'occupant, l'industrie cotonnière menaçait d'être vouée à une longue inactivité. En prévision de cet avenir difficile, l'Association des filateurs se réorganisa en mai 1917 sous la forme de société coopérative, qu'elle a conservée depuis lors. Aussitôt après l'armistice, cette société groupa les commandes de cotons bruts et de matériel de première nécessité, aplanit les difficultés de crédit si sérieuses pour une industrie ruinée par l'occupation et tributaire de l'étranger pour ses matières premières.

Quand, en 1926, l'Association fêta le vingt-cinquième anniversaire de sa fondation, elle pouvait avec fierté regarder l'œuvre accomplie pendant ce quart de siècle. Mais cette œuvre elle en était redevable pour une très large part au Comte Jean de Hemptinne. Vice-Président dès ses débuts, Président depuis 1903, il n'avait jamais cessé de lui assurer le concours inestimable de son activité, de son influence, de sa fine diplomatie et de son autorité indiscutée.

La constitution de l'Association Cotonnière de Belgique en 1899 avait organisé la filature de coton dans le cadre national. Mais le besoin d'une entente internationale allait bientôt se faire sentir. Car au début du XXe siècle une grave question préoccupait l'industrie cotonnière mondiale. La récolte du coton menaçait de devenir insuffisante pour faire face au développement progressif de l'industrie.

Déjà, pendant la guerre de Sécession, l'industrie cotonnière avait connu une pénurie désastreuse de matières premières qui avait même causé la stagnation complète de certains centres industriels cotonniers. Voici que là même la Belgique envisageaient la création et le développement des plantations de coton dans leurs colonies pour ne plus dépendre uniquement de la récolte américaine. Mais ces plans étaient de réalisation lointaine et des mesures urgentes s'imposaient. C'est alors que l'Association Cotonnière de Belgique, réunie en assemblée générale le 14 octobre 1903, décida de se mettre en rapport avec les principales associations de filatures de France, d'Allemagne et d'Angleterre, en vue d'une action commune.

Le 9 décembre 1903, le comte Jean de Hemptinne exposait à l'assemblée générale le résultat de ses démarches auprès de M. Georges Motte, président de l'Association cotonnière française. Ses propositions ayant reçu l'accueil le plus favorable, l'Association cotonnière de Belgique priait son président de poursuivre les négociations et lui donnait l'assurance qu'il serait suivi par les filateurs belges s'il adhérait en leur nom à une entente internationale sur le chômage.

Le 13 janvier 1904, l'assemblée générale était à nouveau saisie de la question. L'Angleterre et la France, tout en reconnaissant la nécessité du chômage, ne semblaient pas près de le réaliser. La réunion estimant que, dans ces conditions, un chômage immédiat n'était pas possible, votait la résolution suivante:

" L'Association cotonnière de Belgique, réunie en assemblée générale, decide en principe le chômage de la filature dans des conditions à déterminer suivant les mesures de chômage adoptées en Angleterre et dans les autres pays."

En transmettant cette résolution à M. C. W. Macara, président de l'Association des filatures anglais, le Comte Jean de Hemptinne écrivait:

" Notre Association estime qu'il serait du plus haut intérêt qu'une entente soit conclue entre les filateurs d'Angleterre et du Continent. Pour atteindre ce résultat, la mesure la plus simple et la plus pratique serait de réunir les délégués des associations cotonnière de tous les pays. Un congrès étudierait les moyens de parer aux excès de la spéculation et désignerait un comité international qui se réunirait chaque fois que les intérêts généraux de l'industrie cotonnière l'exigeraient."

Telle fut l'origine de la Fédération Internationale Cotonnière. Les pourparlers engagés avec les associations cotonnières des divers pays amenèrent la réunion du premier Congrès Cotonnier International, qui se tint à Zurich en mai 1904. Les principaux pays industriels de l'Europe y participèrent et l'accord y fut dèfinitivement conclu. En moins de cinq ans, grâce pour une très large part aux efforts habiles et persévérants du Comte Jean de Hemptinne, la filature belge de coton avait trouvé à l'intérieur la force que donne la cohésion, à l'extérieur la sécurité et la puissance inhérentes à une vaste organisation internationale.

La Fédération ne devait pas cesser de s'étendre. Elle compte actuellement 21 pays adhérents: l'Allemagne, l'Angleterre, l'Autriche, la Belgique, la Chine, le Danemark, l'Egypte, l'Espagne, l'Esthonie, la Finlande, la France, la Hollande, la Hongrie, l'Italie, les Indes, le Japon, la Norvège, la Portugal, la Suède, la Suisse et la Tchéco-Slovaquie.

De 1904 à 1929, elle a organisé douze Congrès Internationaux Cotonniers tenus successivement à Zurich (1904), Manchester (1905), Brême (1906), Vienne (1907), Paris (1908), Milan (1909), Bruxelles (1910), Barcelone (1911), Scheveningen (1913), Zurich (1920), Stockholm (1922), Barcelone (1929). Le prochain Congrès aura lieu à Paris en 1931.

A son initiative, des statistiques sont dressées semestriellement pour établir la consommation et les stocks de coton dans le monde. Ces statistiques sont publiées dans le " Cotton Bulletin," revue trimestrielle de la Fédération, traitant de tout ce qui est relatif à la culture, au commerce et à l'industrie du coton.

La Fédération a organisé l'arbitrage des litiges survenant entre parties de nationalité différente: les industriels de tous pays peuvent ainsi éviter les lenteurs des procédures judiciaires et faire trancher leurs différends par des arbitres compétents.

Enfin et surtout, c'est aux efforts de la Fédération Internationale que l'on doit l'augmentation des récoltes dans les colonies anglaises, françaises, italiennes, hollandaises, portugaises.

Les voyages d'études dans les régions propices à la culture du coton, l'influence des membres de la Fédération sur les gouvernements de nombreaux pays, la propagande intense par des publications largement répandues, ont attiré l'attention sur les besoins impérieux de l'industrie cotonnière et sur les avantages de la culture du coton.

M. A. S. Pearse, secrétaire général de la Fédération, se rendit fréquemment aux Indes, en Égypte, au Soudan, au Brésil, aux Etats-Unis, en Chine et au Japon. Le résultat de ses études est consigné dans des ouvrages pleins d'intérêt.

A la demande des gouvernements de la Colombie, il a parcoura récemment ce pays et son inlassable activité crée sans cesse de nouveaux champs de culture.

On comprenda l'œuvre réalisée par la Fédération si l'on songe que, malgré les ravages occasionnés par le charançon " boll-weevil " aux récoltes américaines et malgré le développement de la consommation des filatures des Etats-Unis, l'industrie cotonnière n'a plus souffert d'une insuffisance de matières premières.

L'œuvre entreprise, la Féderation entend la poursuivre et le meilleur gage de l'heureuse continuation de son programme est certes la nomination du Comte Jean de Hemptinne à la présidence. Il n'a pas été seulement un des grands promoteurs de sa création. Il a été intimement mêlé à sa vie quotidienne et à chacune de ses initiatives. Il en est depuis de longues années le Vice-Président dévoué. Enfin il jouit dans les milieux cotonniers internationaux et d'une très vive sympathie et d'une très grande autorité.

Cette nomination est à son égard un témoignage d'une légitime reconnaissance. Pour Gand, pour l'industrie cotonnière belge, pour la Belgique enfin elle est un grand honneur. Elle assure au pays un rôle prépondérant dans une des grandes industries mondiales. Elle augmente encore le prestige d'un pays qui se trouve toujours égal à lui-même, dans la guerre par la droiture et la vaillance, dans la paix par l'esprit de travail et de progrès.

PRESENTATION TO MR. ARNO S. PEARSE

On his completion of 25 years' service as General Secretary of the International Cotton Federation.

On the evening of May 5, 1930, a banquet was offered by the Italian Cotton Spinners and Manufacturers' Association to the members of the International Cotton Committee at Stresa, and on this occasion Mr. F. Holroyd, as President of the International Cotton Federation, made a presentation to Mr. Arno S. Pearse, on his retirement, at the end of June next, as General Secretary of the International Federation, which position he has occupied for 25 years.

The present consisted of a handsome oak cabinet, containing a solid silver tea and coffee service, together with a silver cigar box.

The inscription on the tray of the service reads —

> Presented to Arno S Pearse by the Committee of the International Federation of Master Cotton Spinners' and Manufacturers' Associations at Stresa (Italy), May 5, 1930, as a token of appreciation for 25 years' highly efficient service as General Secretary of the International Cotton Federation
>
> The International Cotton Committee

(Then follow the fac-simile signatures of the Committee)

Mr Holroyd added that the regret at losing the valuable services of Mr Pearse as International Secretary was tempered by the fact that the International Federation would still retain him in the capacity of Expert Adviser to the Committee, in whose interests and those of the members he had laboured so diligently, conscientiously, and satisfactorily for the past quarter of a century

Messrs Olivetti (President of the Italian Association), Count Jean de Hemptinne, John Syz, Dr G Mylius, Arthur Kuffler, and Paul Schlumberger also paid tributes of respect, praise and appreciation of the untiring services rendered by Mr Pearse to the International Federation

Mr Arno S Pearse, on receiving the gifts, spoke of the intense pleasure he had taken in the tasks entrusted to him, and said that whatever success he had attained had only been achieved by hard work, and still more hard work He thought this was the appropriate keynote in these days of distress, if the former prestige and power of the cotton industry as a whole had to be regained Mr Pearse thanked the Committee for all the kindness he had received and the indulgence they had shown to him during the 25 years, he also expressed great satisfaction at the personal honour that had been paid to him by the appointment of his son as his successor Concluding, Mr Pearse said the International Committee could be assured that, as far as lay within his power, he would continue to further the aims and aspirations of the International Federation, which enjoyed world-wide respect and admiration

Causes of the World-Wide Depression in the Cotton Industry and Possible Remedies.

This is the title of one of the main subjects which will engage the International Cotton Congress that is to be held in Paris, June 23 to 25, 1931

It is proposed that each affiliated association should consider the causes and remedies from its special points of view, and submit to the International Committe a report, with a view to common action being taken at the Paris Congress It is suggested that these reports be in the hands of the International Committee not later than March 1, 1931

Amongst the causes which have upset the equilibrium between supply and demand there are many, and whilst the following enumeration is not regarded as complete, yet it may serve to stimulate thought, and it is with this purpose in view that we sketch out these headings.

(1) The enormous post-war development of the cotton industry in the East, principally Japan, India and China, which countries, largely through double and treble shifts, have conquered many markets in the Near and Far East and Africa, particularly in greys, thus displacing the staple products of old suppliers.

(2) The apparent adoption of the 48 hour week in many European countries which, paradoxically though it may sound, has led to the increased working of existing machinery (through the introduction of temporary double shifts) in many European countries whenever there is a spurt in the demand, thus leading to very short-lived periods of steady business.

Whilst before the Washington Conference many countries worked 56 and 58 hours, it has become possible to run machinery in double shifts of 46 or 48 hours per week, or with the addition of three to five hours of overtime, as allowed in several countries on the Continent, thus, since the introduction of the 48 hour week, the total working capacity of machinery has increased in many Continental countries. New mills established since the war have only been able to work remuneratively because the cost of production could be decreased by double shifts.

(3) The general increase in the Custom House Tariffs in all countries except England has created many barriers to the cotton trade, forced down prices and reduced export trade.

(4) The civil war in China and the political upset in India with boycotts against foreign made goods have had grave consequences for the cotton industry of Lancashire in particular. The latter has been forced to look for other markets, and thus the whole world has been made to feel the repercussion of Lancashire's losses in the Far Eastern markets.

(5) Many agricultural products are near pre-war levels. 75 per cent of the clients of the cotton industry represent the labourers and their families engaged in agriculture in all parts of the world. Probably agriculture has not yet adjusted itself to the changed conditions brought about by the huge extension of mechanical transport, releasing vast areas used formerly for fodder crops.

(6) The effect of the fashion of short skirts and little underclothing has been marked on the cotton industry. Whilst artificial silk has taken away some trade from the cotton industry, it has on the other hand helped to sell other goods partly made with cotton.

(7) Rationalization has proceeded probably quicker than has been realized, and this progress, whilst of final advantage to the world, has created an *interregnum* from which industry as a whole is temporarily suffering. Science has been applied to agriculture, seed selection, artificial manures, increased milk supply through scientific selection of cows, use of agricultural machinery, electricity has been applied to agriculture, private homes, factories, etc., oil burning in place of coal. Labour-saving appliances have been introduced everywhere in mines, factories, farms and homes, all for the

purpose of economising labour and bringing about, for a time, unemployment and reduced purchasing power of the masses. The first economies of any unemployed family are in respect to underwear and replenishment of cotton goods used in the household.

All the achievements of science have tended to produce more with less labour than in the past, thus creating in many articles overproduction and simultaneously unemployment. This saving of labour has been forced upon industry through increased rates of wages in the post-war period; the higher rates of wages have accelerated rationalization in all directions.

(8) Price of silver is the lowest on record, and China, besides being engaged in a civil war, has the great handicap of a silver monetary system.

(9) The deflation in the monetary systems of European countries.

(10) The crash on the American Stock Exchange with its world-wide influence in all industries.

(11) Rationalization in some cotton mills, especially in U.S.A. and Japan, with higher output per machine against which conservative mills are unable to compete.

(12) Too short a working week in some countries and consequent high cost of production.

(13) The more general introduction of the " instalment " system of payment has caused a spending of earnings in anticipation and accentuated the crisis.

(14) The excessive burden placed on industry by " social legislation " and other taxes.

(15) Antiquated trade union restrictions ought to be abolished and be adapted more in relation to the advance made in the modern technical equipment of the mills, where a great deal of labour-saving machinery has been introduced. Wages require to be readjusted in ratio to these modern equipments. Both these are amongst the recommendations made by a special Commission appointed by the British Labour Government to investigate the causes of the depression of the British Cotton Industry.

Amongst the remedies that suggest themselves there is likely to be much dispute whether they may be regarded as a cause or as a remedy. Thus rationalization may, if resorted to too rapidly and too generally, become for a period at least, the cause of unemployment for some mills.

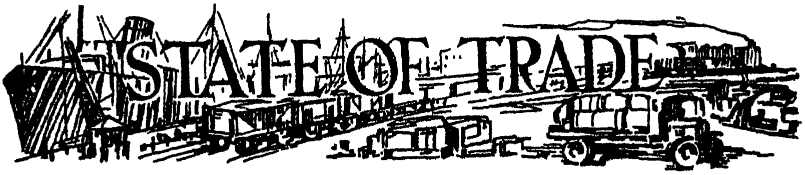
There are many who will argue that the interference of Govern ments (U.S.A. and Egypt) in the purchase of raw cotton has been a detrimental factor, yet others are of the opinion that these valorization schemes have for their object the steadying of the price of the raw material on a level that will be sufficient for the farmer to produce it. Limitation of acreage by the farmers would correspond to the action of organized short time amongst the spinners.

Amalgamation of mills is one of the remedies adopted in most countries, and consequently it may be regarded as the most hopeful one. " Survival of the fittest " is a policy hardly recommendable in our so-called enlightened times, yet still advocated by a large number of mill owners.

Marketing direct to the consumer is another of the remedies that has been suggested.

It is not claimed that this list of causes or remedies is complete. The purpose of this article is mainly to direct the line of thought to these and other causes and remedies, so that when the time comes for the preparation of the reports there is some groundwork done.

ARNO S. PEARSE.



REPORTS FROM ASSOCIATIONS.

AUSTRIA.

SPINNING SECTION.

Since the beginning of 1930 the number of spindles at work has diminished from, in round numbers, 750,000 to 666,000, that is, about 12 per cent. Yarn production has experienced a similar reduction. Compared with January, 1929, the number of spindles at work has diminished exactly 33¼ per cent. These facts alone give a clear idea of the critical condition of business, a condition which has by no means come to its end yet, but grows daily more acute. In the first four months of 1930, exports from Austria were: —

Cotton yarn:	Square metres		In Jan. 1929 Square metres
Unbleached	22,000	as against	34,039
Bleached	542	,,	518
Dyed	849	,,	1,048
Total	23,411	,,	35,605

which makes the reduction in these four months 34.2 per cent. as compared with 1929. Business with Germany and Hungary has suffered most severely by this shrinkage, while exports to Roumania and Jugoslavia are also considerably reduced. Home trade is thoroughly unsatisfactory, as is clearly seen from the fact that in January, 1929, 438,000 kilograms, in round numbers, could have been delivered to Austrian buyers against 338,000 kilograms in April, 1930, which works out at a reduction of practically 23 per cent. Export prices are ordinarily associated with losses, while in the home trade they have moved very close to rock-bottom prices.

An improvement in the state of business is not to be expected in the immediate future, because home consumption of cotton goods can hardly recover from its present state of depression when general economic relations are considered, while the chances of a rise in exports are slight when the equally unfavourable conditions in the countries to which we export are taken into account.

WEAVING SECTION

Of the 17,000 weaving looms which are in place in Austria, something like 4,000 are not working, while a portion of the remainder are running under short time. The reduction in production of cloth compared with last year must have reached about 30 per cent in the first four months of this year. In contrast with this severe set-back in business the import of cotton cloth has remained comparatively high, for the figures are :—

Cotton cloths			In Jan. 1929
	Square metres		Square metres
Unbleached	16,696	as against	18,738
Bleached	2,828		2,820
Dyed in piece	2,493		2,653
Printed	1,316		1,238
Dyed in yarn	5,979	,,	6,049
Total	29,312		31,498

Consequently, imports of cloth have only diminished about 7 per cent as compared with 30 per cent, the deficiency in production. These figures show that the share of the home industry in meeting with the requirements of the home trade is considerably less than in the previous year, a phenomenon which is to be explained principally by the fact that the Austrian customs duty on cotton cloth is in the present critical relations of the European cotton industry an insufficient protection against our markets being made a dumping ground for the excess production of the countries which compete with us. For the reasons previously stated an improvement of this state of things is not be expected in the near future. Rather a further shrinkage of activity in the weaving industry is to be anticipated, unless in the course of the impending discussions for a commercial treaty a rectification of the quite inadequate protective duty on cloth could be happily secured for the weaving industry.

BAUMWOLLSPINNEREI

Seit Beginn des Jahres 1930 ist die Zahl der betriebenen Spindeln von rund 756,000 auf 666,000, demnach um cca 12% zurückgegangen. Eine analoge Herabminderung hat auch die Garn-Produktion erfahren. Gegenüber dem Januar 1929 beträgt der Rückgang der Betriebsspindeln genau 33⅓%. Diese Feststellungen allein geben ein deutliches Bild der krisenhaften Geschäftsentwicklung, die aber noch keineswegs zum Abschlusse gekommen ist, sondern sich täglich verschärft. In den ersten 4 Monaten des Jahres 1930 wurden aus Oesterreich ausgeführt :—

			Im Jahre 1929
	M q		M q
Baumwollgarne, roh	22,020	gegenüber	34,039
Baumwollgarne, gebleicht	542	,,	518
Baumwollgarne, gefärbt	849	,,	1,048
Zusammen	23,411		35,605

Somit betragt der Ausfuhrruckgang in diesen 4 Monaten gegenuber dem Jahre 1929 54 2 Am starksten ist von diesem Ausfall das Geschaft mit Deutschland und Ungarn betroffen, doch ist auch der Export nach Rumanien und Jugoslavien in auffallender Weise rucklaufig Auch das Inlandsgeschaft ist ein vollig unbefriedigendes, was in der Tatsache zum Ausdruck kommt, dass im Januar 1929 noch rund 455,000 kg an osterreichische Kunden abgeliefert werden konnten, gegen 358,000 kg im April 1930, woraus sich ein Ausfall von rund 25 ergibt Die Preisbildung im Export ist durchgangig mit Verlusten verbunden, wahrend sie sich im Inlandsgeschaft knapp auf Basis der Selbstkosten bewegt Fur die nachste Zukunft ist eine Besserung der geschaftlichen Lage nicht zu erwarten, weil sich der heimische Konsum in Baumwollgeweben im Hinblick auf die allgemeinen wirtschaftlichen Verhaltnisse von seinem jetzigen Tiefstand nicht so bald erholen durfte, wahrend die Chancen fur eine Steigerung des Exportes in Anbetracht der ebenso ungunstigen Lage in den Absatzlandern geringe sind

BAUMWOLLWEBEREI

Von den in Oesterreich vorhandenen cca 17,000 Webstuhlen sind rund 4,000 ausser Betrieb gestellt, wahrend die restlichen Stuhle zum Teil in Kurzarbeit laufen Der Erzeugungsausfall in Webware gegenuber dem Vorjahre durfte in den ersten 4 Monaten dieses Jahres cca 30% erreicht haben Im Gegensatze zu diesem starken Beschaftigungsruckgang ist die Einfuhr an Baumwollgeweben in den ersten 4 Monaten des Jahres 1930 eine verhaltnismassig hohe geblieben, denn es wurden importiert

	M q		Im Jahre 1929 M q
Rohe Baumwollgewebe	16 696	gegenuber	18,738
Gebleichte Baumwollgewebe	2 828	,	2,820
Gefarbte Baumwollgewebe	2 493		2,653
Bedruckte Baumwollgewebe	1,316		1,238
Buntgewebte Baumwollgewebe	5,979	,	6,049
Demnach zusammen	29 312	,	31 498

Es ist somit die Gewebe-Einfuhr nur um 7 zuruckgegangen, gegenuber dem Produktions-Ausfall der Industrie von 30% Diese Ziffern zeigen, dass der Anteil der eigenen Industrie an der Deckung des heimischen Bedarfes ein bedeutend geringerer ist, als er noch im vorigen Jahre war, eine Erscheinung, welche in der Hauptsache darauf zuruckzufuhren ist, das die osterreichischen Gewebezolle unter den derzeitigen Krisenverhaltnissen der europaischen Baumwollindustrie keinen entsprechenden Schutz gegen die Ueberschuttung des Marktes mit den Produktions-Ueberschussen der Konkurrenzlander bieten Aus den schon fruher erwahnten Grunden ist mit einer Besserung dieser Lage fur die nachste Zeit nicht zu rechnen Vielmehr sind weitere Betriebseinschrankungen auch in der Weberei zu erwarten, wenn es nicht im Zuge der bevorstehenden Handelsvertragsverhandlungen gelingen sollte, eine Verbesserung des ganz unzulanglichen Zollschutzes der Webindustrie herbeizufuhren

(*Verein der Baumwollspinner und Weber Oesterreichs*)

BELGIUM.

The poor situation described in our last report was still more marked at the end of the last quarter.

The spinning section is suffering from the period of slackened activity of the weaving section, and is experiencing the usual difficulties of making exports.

Stocks are increasing and several spinners have been obliged to adopt short time. In the weaving section business remains quiet.

The number of operatives who are stopped and who are on short time is increasing more and more.

The original text in French follows:—

La situation peu brillante signalée dans notre rapport précédent s'est encore accentuée au cours de ces derniers mois.

La filature subit le contre coup du ralentissement de l'activité du tissage et des difficultés toujours croissantes rencontrées à l'exportation.

Les stocks augmentent et plusieurs filatures sont obligées de pratiquer le " short time."

En tissage les affaires restent calmes.

De nombreux métiers sont arrêtés et le " short time " s'étend toujours davantage.

(*Société Co-opérative Association Cotonnière de Belgique.*)

CZECHO-SLOVAKIA.

The Czechoslovakian textile industry, and with it the cotton-spinning industry, which had experienced unfavourable conditions in 1929, suffered a decided set-back in the first half of 1930, which not only depressed the home sales but also the export of yarn to so low a level that the grievous misgivings of the spinning world concerning the future seem to be amply justified. The arrival of fresh orders and the report of actual sales persist in being quite inadequate and in showing a tendency to diminish. As a consequence of this, we must calculate on a permanent increase in the shrinkage of activities, which already amounts to an average of 20 per cent., and on further complete stoppage of whole mills. Stocks continue to diminish and possibility of employment is offered only for a brief period.

Nor has any improvement appeared as regards the price at which yarn has been selling of late, a price which hardly covers the cost of production. Neither home trade prices nor export prices yield any profit; competition is so fierce. On the top of all this comes a widespread feeling of insecurity, caused through severe losses resulting to the spinners from bankruptcies and through the lower prices of the raw material, so that, under these circumstances, a continuation of production can only be described as unremunerative for many firms. Many calls have been heard for some united action, on a large scale, of the cotton spinners to offer opposition to the further decline of this important branch of the industry.

The original report in German follows:—

Die schon im Vorjahre ungünstige geschäftliche Lage der Csl Textilindustrie und damit auch der Baumwollspinnerei, erfuhr im ersten Halbjahr 1930 eine wesentliche Verscharfung, die nicht bloss den Absatz am Inlandsmarkt, sondern auch den Garnexport auf einen Tiefstand herabgedrückt hat, der die schweren Besorgnisse der Spinnerkreise für die Zukunft vollauf gerechtfertigt erscheinen lasst.

Der Auftragseingang wie auch der Abruf auf bestehende Abschlüsse, sind dauernd ganz unzulänglich und im Abnehmen begriffen. Infolgedessen muss mit einer ständigen Zunahme der ohnehin durchschnittlich schon 20% betragenden Betriebseinschränkungen und weiteren vollständigen Stillegungen ganzer Betriebe gerechnet werden. Der Beschäftigungsvorrat sinkt anhaltend und bietet nur noch für kurze Zeit Arbeitsmöglichkeit.

Auch hinsichtlich der zeitweise kaum die Eigenkosten deckenden Garnverkaufspreise ist keine Besserung eingetreten; weder die Inland- noch die Exportpreise werfen bei der verstärkten Konkurrenz einen Gewinn ab. Hiezu kommt die allgemeine Unsicherheit, hervorgerufen durch empfindliche Verluste der Spinner bei Insolvenzen und die rückläufige Bewegung der Rohmaterialpreise, sodass unter diesen Umständen die Fortsetzung der Produktion für viele Betriebe als unrentabel zu bezeichnen ist.

Es mehren sich daher die Stimmen, welche für grosszügige gemeinsame Aktionen der Baumwollspinner eintreten, um dem weiteren Verfall dieses so bedeutenden Industriezweiges entgegenzuarbeiten.

(*Wirtschaftsverband csl. Baumwollspinnereien.*)

ENGLAND.

SPINNING SECTION.

The past quarter has been a difficult period for spinners of both Egyptian and American yarns. Especially has this been the case in the American section of the trade, which has not worked more than 50 per cent. of full capacity.

Efforts are being made by spinners of Egyptian cotton to form a convention, whereby, given the requisite support, this section will be regulated and controlled.

On July 4 the Government Committee of Enquiry into the Cotton Trade issued their report and recommendations, and the various organizations concerned are studying these with a view to seeing what are the possibilities of giving effect to such recommendations.

WEAVING SECTION.

The manufacturing section of the cotton trade is still depressed, more looms are idle than was the case three months ago, and the outlook is unpromising. Particulars of looms working are as follows:—

April	May	June
52.23%	62.17%	55.85%

FRANCE.

The position of the French cotton industry is considerably worse than since the publication of the last issue of the International Cotton Bulletin in April. The state of trade is really poor in all sections of the industry (the Egyptian spinning section, American spinning section, and weaving section) and generally there is a tendency for a further decline in business.

During the whole of the last quarter orders have been smaller and deliveries have been considerably reduced. Stocks have increased, and commenced to bear down on the market considerably, notably in fine counts. Prices are really poor.

The difficulties of sale in the foreign markets do not cease to increase as a result of the very low prices offered by other countries. Exports to these markets show a marked decline in comparison with the report in 1929.

The question of organized short time is being studied, but the likely result is still uncertain; there has been no increase of wages.

The original text in French follows:—

L'état des affaires dans l'industrie cotonnière française s'est sensiblement aggravé depuis la publication du Bulletin International d'Avril dernier.

La situation est nettement mauvaise dans toutes les branches de l'industrie (filature de jumel, filatures d'Amérique, tissage) et très généralement elle accuse encore une tendance à l'aggravation.

Pendant tout le trimestre les ordres ont été inférieurs à la production et les engagements à livrer se sont considérablement réduits. Les stocks augmentent et commencent à peser lourdemant sur le marché notamment en ce qui concerne les filés fins. Les prix sont franchement mauvais.

Les difficultés de vente sur les marchés étrangers ne cessent de s'accroître en raison des très bas prix pratiqués par d'autres pays et les exportations sur ces marchés sont en régression marquée par rapport à 1929.

L'éventualité d'un chômage concerté est à l'étude sans qu'on puisse du tout préjuger du résultat de l'enquête qui a été ouverte à ce sujet.

Aucune augmentation de salaires n'est à signaler.

(*Syndicat Général de l'Industrie Cotonnière Française.*)

COMMERCE EXTÉRIEUR

I. IMPORTATIONS (IMPORTS)

	1er trimestre	
	1930	1929
	Quintaux métriques (Metric quintals)	
(1) Fils de coton (cotton yarns)	11,092	8,754
(2) Tissus de coton et autres produits manufacturés (cotton cloths etc.)	10,199	5,089

II. EXPORTATIONS (EXPORTS)

(1) Fils de coton (cotton yarns)	33 091	11 69
Destination		
Algérie, Colonies françaises et pays de protectorat (Algeria and French Colonies)	3 607	356
Marchés étrangers (foreign markets)	29 484	10 933
(2) Tissus de coton et autres produits manufacturés (cotton cloths, etc.)	166 66	16 826
Destination		
Algérie, Colonies françaises et pays de protectorat (Algeria and French Colonies)	106 151	91 174
Marchés étrangers (foreign markets)	60 215	72 652

GERMANY.

SPINNING SECTION

No improvement has taken place in the position of the German cotton spinning industry during the second quarter of 1930. Sales showed no improvement; they remained, as before, far below normal. At the same time it has not been found possible to place selling prices on a more healthy basis. The amount of organized short time at present being worked must not only be continued, but also considerably increased. The production of the German cotton spinning trade has now sunk to less than 70 per cent. of its normal capacity.

The position is particularly aggravated due to the fact that offers made by foreign countries are quoted even below the unremunerative German selling prices.

The following is the original report in German:

SPINNEREI

Auch im abgelaufenen II. Quartal 1930 ist eine Besserung in der allgemeinen Lage der deutschen Baumwollspinnerei nicht eingetreten. Die Verkaufstätigkeit erfuhr keine Belebung, sie blieb vielmehr nach wie vor, weit hinter dem Normalstand zurück. Ebenso war es nicht möglich, die Verkaufspreise auf eine gesunde Basis zu bringen. Die bestehenden Betriebseinschränkungen mussten daher nicht nur weiter aufrecht erhalten, sondern vielfach noch verschärft werden. Im Durchschnitt ist die Produktion der deutschen Baumwollspinnereien unter 70% ihrer Kapazität gesunken.

Die Lage wurde noch dadurch besonders verschärft, dass die an sich schon völlig unzulänglichen deutschen Verkaufspreise durch ausserordentlich niedrige Angebote des Auslandes immer wieder unterboten wurden.

(*Arbeitsausschuss der Deutschen Baumwollspinner-Verbände.*)

WEAVING SECTION

The position of the South German cotton weaving industry has not improved at all during the second quarter of 1930. As before customers are holding back the distribution of new orders and are only covering their most urgent requirements. In consequence of this inadequate demand extensive short time had to be introduced during the second quarter. There does not appear to be any possibility in the near future of an increase in activity of the mills; on that account short time is considered to be necessary in the future or it may even be increased. Prices as usual are totally insufficient.

The original report in German follows:—

WEBEREI.

Die Lage der süddeutschen Baumwollweberei hat im II. Quartal 1930 keinerlei Besserung erfahren. Die Abnehmerschaft übt nach wie vor in der Erteilung neuer Aufträge ausserordentliche Zurückhaltung und deckt nur den allerdringendsten Bedarf ein. Infolge des unzulänglichen Auftragsbestandes mussten daher auch im II. Quartal umfangreiche Betriebseinschränkungen fortgeführt werden. Es besteht leider keine Aussicht, in absehbarer Zeit zu einer grösseren Ausnutzung der Betriebe zu kommen. Die Betriebseinschränkungen werden daher auch in der Folgezeit aufrecht erhalten oder noch vermehrt werden müssen. Die Preise sind nach wie vor unzulänglich.

(*Verein Süddeutscher Baumwollindustrieller.*)

An Exchange telegram from Berlin, dated July 7, states that the Rhenish-Westphalian cotton spinning mills have unanimously agreed to curtail production by one third as from August 1. It was stated that sales have been effected by the reduced English prices following lower wages.

It was further stated that 60 per cent. of the operatives in the Gladbach Rheydt district were without work.

HUNGARY.

Hungarian trade in cotton yarns and cloth during the first five months was as follows:—

IMPORTS IN QUINTALS.

	1929	1930
Cotton yarns	24,307	11,101
Grey cotton goods	15,352	12,286
Bleached cotton goods	4,265	3,240
Dyed cotton goods	1,039	735
Printed cotton goods	1,663	1,169
Fancy woven cotton goods	4,581	2,730

EXPORTS IN QUINTALS.

	1929	1930
Cotton yarns	1,649	2,506
Cotton goods total	6,364	3,564
Of which printed	5,387	3,169

As will be seen from the above figures, imports during the current year have fallen considerably. This is especially marked in cotton yarns, due to the activity of new mills erected last year.

In spite of the falling imports of cotton goods, the position of the Hungarian cotton-weaving industry has not improved; prices are low and the terms of payment are rather unfavourable for the mills.

The looms are turning out more and more rayon and half-silk goods. The position in the knitting and embroidery sections is likewise unchanged. Stocks of these goods are satisfactory and the demand for them, for the most part, is furnished by the home industry.

The original text in German follows:—

Der Aussenhandel Ungarns an Baumwollgarnen und Baumwollwaren gestaltete sich in den ersten 5 Monaten des laufenden Jahres wie folgt:—

EINFUHR IN Q. (IMPORTS IN QUINTALS).

	1929	1930
Baumwollgarne (cotton yarns)	24,307	11,101
Rohe Baumwollgewebe (grey cotton goods)	15,352	12,286
Gebleichte Baumwollgewebe (bleached cotton goods)	4,265	3,240
Gefärbte Baumwollgewebe (dyed cotton goods)	1,039	735
Bedruckte Baumwollgewebe (printed cotton goods)	1,663	1,169
Buntgewebte Baumwollgewebe (fancy woven goods)	4,581	2,730

AUSFUHR IN Q. (EXPORTS).

	1929	1930
Baumwollgarne (cotton yarns)	1,649	2,506
Baumwollgewebe insgesamt (cotton goods total)	6,364	3,564
Hievon entfallen auf bedruckte Baumwollgewebe (of which printed)	5,387	3,169

Wie aus den obigen Daten ersichtlich, ist die Einfuhr im laufenden Jahre wieder erheblich zurückgegangen. Bei den Baumwollgarnen erklart sich dieser Umstand teilweise durch die Tatigkeit der im vorigen Jahre in Betrieb gesetzten neuen Spinnereien. Trotz des fallenden Importes an Baumwollwaren hat sich die Lage der ungarischen Baumwollwebereien nicht gebessert; die Preise sind gedrückt und die Zahlungsbedingungen für die Fabriken ziemlich ungünstig. Auf den Webstühlen werden in immer grosserem Masse kunstseidene und halbseidene Artikel gearbeitet. Die Lage der Strickerei- und Wirkereifabriken ist gleichfalls unverandert; der Absatz ist besonders an Strümpfen und Trikowaren befriedigend und der Bedarf an diesen Waren wird zum grossten Teil von den inländischen Fabriken gedeckt.

(*Landesverein der Ungarischen Textilindustriellen.*)

ITALY.

Recently the sales of yarn have dropped and it is probable that the spinning mills will further have to reduce their production.

The weaving mills also experience difficulty in selling their goods, not only in Italy but also abroad.

The figures of Italian imports and exports from January 1 to April 30, of the years 1930, 1929 and 1928, are compared in the following table:—

	1930		1929		1928	
	Q.li	Lire	Q.li	Lire	Q.li	Lire
Imports of Raw Cotton ..	915,653	736,019,838	930,151	862,105,730	848,437	785,437,895
Yarn Exported	81,670	115,624,587	81,291	123,628,067	81,262	122,866,782
Cloth Exported	162,127	381,311,377	178,103	436,700,063	170,952	447,352,671
	243,797	496,965,964	259,394	560,328,130	252,214	570,219,453

As already mentioned in our report on the Italian Cotton Industry for the first quarter of this year, the profits on the sales both at home and for export continue to be almost nil, a fact which corresponds to the considerably fallen prices.

JAPAN.

During May the Japanese Cotton Spinners' Association decided to increase curtailment in the mills from 17.2 per cent. to 27.2 per cent. This new rate to be operative from June 16 to the end of this year.

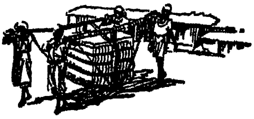
Spinners have had to resort to short time owing to increasing stocks of yarn and cloth in the mills and the falling-off in export trade, brought about by the removal of the gold embargo, the slump in silver, and the increase in Indian cotton duties. It is estimated that the increase in short-time working will mean the dismissal of some 15,000 cotton operatives in Japan, and labour trouble is brewing. According to "Finance and Commerce," Shanghai, trade union leaders are threatening a general strike of cotton-mill workers, but it is doubtful if it will materialize since the unions are not strong.

SPAIN.

It is very difficult to define exactly the tendency of the Spanish market in textiles. Owing to its great diversity, conditions are not uniform.

The general tendency of prices is a downward one. In some textiles Spanish manufacturers work without any margin of profit, but in fine yarns the profit is satisfactory. Printing establishments are working full time; dyers are working irregularly, those turning out novelties being better engaged.

There is a great lack of demand for the typical cloths made of carded yarns, though in wide ones trade is better. Owing to the depression of the peseta there is a regular demand for exports of our goods.



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COTTON GROWING IN NEW COUNTRIES

British Cotton Growing Association.

THE twenty-fifth Annual Report of the British Cotton Growing Association records substantial progress in the development of cotton growing in the British Colonies. The increase in production is more remarkable in face of the fact that the conditions in the cotton industry continued to be unsatisfactory.

The Association reports that there are now ample supplies of Empire and other outside growths of cotton, and with the deterioration of the quality of the American crop these cottons are becoming more popular amongst spinners, not only in this country, but on Continent. The Cotton Trade is gradually coming to realize the importance of Empire and outside growths of cotton, and the increase in production is already having an effect upon the price for American and Egyptian. Empire and other miscellaneous growths can now be purchased on a reasonable basis in comparison with American, and given normal trade conditions there is no doubt that spinners will use them more extensively in the future, as supplies can now be obtained throughout the year.

A review of the work accomplished in the different colonies follows:

INDIA.

The cotton crop germinated well on all farms except some of the newly developed lands in Nili Bar. The "white-fly" pest of cotton was carefully watched throughout the year. The first white-flies were seen when the earliest plants were three or four inches high in the month of May. The pest increased at a very fast rate and by the middle of July the infestation was exceptionally heavy on all varieties. There were strong indications at the time that the yield and quality of the cotton crop would be as bad if not worse than experienced during the past three years of diseased crop. Fortunately the heavy rains of July and August resulted in the destruction of most of the matured white-flies. As a result all varieties improved considerably, and it is satisfactory to be able to report that though the yields obtained last year are appreciably lower than those recorded in the non-disease years the final yields are appreciably higher than during the previous three years. It has been found that American varieties are less susceptible to the effects of white-fly when sown late and this practice is now adopted on all the company's farms. The *desi* (indigenous) varieties, being less susceptible to white-fly attack, are sown first The earlier experimental evidence of the ready response of diseased plants to late manuring with nitrogenous manures have been confirmed and it is probable that this practice will be adopted on a commercial scale next season

The cultivation of 4F variety of Punjab-American, which comprises the greater portion of the American type grown in the Punjab, has been discontinued at the Khanewal Demonstration Farm, as well as on most of the other farms managed by the company The following statement serves to indicate the unsuitability of this type for local conditions

During the past year the 289F variety has proved its superiority over all other varieties on practically all farms, in virtue of the premium offered for this quality coupled with its relative yielding capacity

About 200 acres of cotton were especially allotted for experimental purposes in testing cotton varieties, and in manurial and other experiments, including those undertaken by the cotton research botanist Sixty selections made by the company's staff from the 289F commercial crop and also some imported varieties were tested Some of the new selections show considerable promise and they will be propagated at as fast a rate as possible A system of pure seed supply to meet full requirements of the company as well as those of other land holders and of the Department of Agriculture has been adopted

The entomologist deputed by the Indian Central Cotton Committee to investigate the white fly pest at Khanewal is doing valuable work, which indicates that the white-fly can in part be controlled by spraying the cotton plants with a compound of rosin and soda Experimental results indicate that an additional yield of 100 to 200 pounds may result from this treatment Control by this method on a semi-commercial scale will be undertaken next season There are indications that the white-fly pest is in large part controlled by its parasites and depredators The Khanewal entomologist is investigating the possibility of breeding these and of preserving them in cold storage until such time as they may be required for the outbreak of the pest in the early summer months

GENERAL REMARKS

The B C G A (Punjab), Ltd , has now been actively interested in cotton growing in the Punjab for the past nine years, and the extent to which it is contributing towards the agricultural development of the Province may be gauged from the following facts —

1 The greatest source of capital wealth in the colony areas of the Punjab is cotton In addition to the indigenous varieties, an American variety known as 4F is grown over a large area of three million acres annually This variety suffered severely from some unknown disease in 1919 and 1921 It also lends itself readily for mixing with the indigenous types, it having only ⅞-in staple as compared with about ¾ in of the indigenous types The mixing of different staples in the Punjab has now reached a chronic stage, and probably cannot be controlled even by legislation

289F The company has been instrumental in popularizing the

Punjab-American 289F variety—staple 1⅛ ins A few ounces of seed of this variety were brought from Mr Milne's selections in Lyallpur in 1921 by Professor Roberts Since that year it has been grown on constantly increasing areas at the Khanewal farm It has consistently given better yields, and has shown itself more resistant to disease than 4F In the season just over it was sown on over 4,000 acres in the various farms of the company, and produced nearly 3,000 bales

A variety known as 285F which had been recommended by the Agricultural Department from about 1919 onwards, and which has never been favoured by the company, has now completely disappeared As regards 289F, the Agricultural Department in a meeting of the Provincial Board of Agriculture at Simla as late as last August gave it as their view that this cotton could only be grown where sufficient water was available for irrigation in November It is interesting to note that in the past year, on three of the company's farms, where water supply was available up to October 15 only and was very erratic throughout the summer, this variety has given better yields than both 4F and the indigenous types

WEST INDIES

The production of Sea Island cotton in the West Indies during 1929 exceeded 5,000 bales of 400 lb each, which showed a slight increase on the previous season, and was more than sufficient to meet the requirements of spinners of this long-stapled variety Larger quantities were produced in the islands of Montserrat, Antigua, St Kitts, Nevis and Anguilla, and there was a slight falling-off in production in St Vincent and Grenada Weather conditions generally were favourable, there were no hurricanes or serious storms during the year, but in Montserrat heavy rains in June and July caused some boll-shedding, and there was a likelihood that the crop would be adversely affected Later reports were more favourable and the final figures for the crop indicate a record yield and a record return per acre for Montserrat

The heavy rains in October and November, 1928, in St Vincent caused heavy loss from boll diseases, with the result that the crop was short and the returns per acre low Professor Ballou, the Commissioner of Agriculture, visited St Vincent in April, 1929, and as a result of his investigations the first day for planting cotton in the 1929-30 season was changed to September 1 Hitherto the cotton has generally been planted in June and July, and the most persistently regular cause of low yields for many years has been the excessive moisture during October and November The latest reports indicate that the change in the cotton season has greatly improved the quality of the lint, although a reduced acreage was planted owing to the doubt entertained by cotton growers regarding the late cultivation of the plants The quality of St Vincent cotton has deteriorated during the past few years, and investigations are now being made with a view to finding out how far such deterioration has proceeded and what can be done to correct the situation and restore the St Vincent strains to their former condition of uniformity and excellence No figures are available for cotton production in Barbados during 1929, as a closed season of one year was maintained in that island with the object of reducing the attacks of the pink boll worm

The production recorded for Anguilla and Nevis is high compared with the figures for recent years, and if the acreage returns are fairly accurate a very good average yield has been secured

The absence of any severe attack by pink boll worm during the season just closed is worthy of note, and, in fact, the general absence of pests or diseases is noteworthy In Anguilla Montserrat, Nevis and St Kitts practically no damage was done by pink boll-worm to the 1929 crop, and only slight attacks of cotton worm were recorded

NIGERIA—SOUTHERN PROVINCES

Favourable climatic conditions throughout the planting and growing period resulted in an appreciable increase in the quantity of cotton purchased during 1929—viz, 7,220 bales against 4,292 bales for 1928 The proportion of first grade cotton was also notably higher

Included in this figure are 921 bales of new type Ishan The increase in this type from 69 bales in 1928 is indeed remarkable, and the Agricultural Department is to be congratulated on an achievement which has been attained only by close supervision and the most rigid economy in the use and distribution of the small amount of seed available from the previous season's crop

Within a few years it is probable that Ishan will supersede entirely the original native type in the chief growing areas of Southern Nigeria Its appeal to the native grower is the higher price obtainable, which is merited for reasons of higher lint percentage, strength and length of staple

In appearance and character Ishan cotton resembles Peruvian, with which it is closely allied botanically, and should appeal to users of Peruvian and similar cottons

The small quantity so far produced has been insufficient to evoke any great interest on the part of spinners, but with the expected larger crop available for 1930 increased interest in the type can be looked for

There was an increase in the seed distributed for planting in 1929 for the 1930 crop, and at a conservative estimate the production of Ishan cotton alone will be around 4,000 bales This will be, therefore, the first season when a commercial quantity will be available

NIGERIA—NORTHERN PROVINCES

In this field of operations it is pleasant to report an increase in the output of American type cotton, production being 23,458 bales against 20,238 for 1928 This improvement in production is reasonably assumed to be some indication that the country is slowly but surely recovering from the setback experienced in 1926-27, when drought caused a failure of the cotton crop and a severe food shortage 1928 was a year of recuperation, the creation of a food supply being the first consideration Ample reserves are now available and once again the native farmer is able to return to crops for export.

Growing conditions were favourable and early planted cotton gave a fair yield Grade was well maintained, and in this connection the Agricultural Department's organization continues to do excellent work, all grading being under their control.

Seed distributed this season for planting for the 1930 crop, exclusive of the Lokoja area, reached 3,173 tons against 2,040 tons last season. Although the quantity distributed cannot be taken as a reliable index to the expected crop, it is, however, certain that with a continuation of the excellent growing conditions a big crop is assured.

SIERRA LEONE

Very useful experiments are being carried out by the Agricultural Department with the breeding of Quande cotton on the apprentices' model farm at the Njala Station. In the past there has been a lack of sufficient labour for sowing and cultural operations, but it was hoped that the allotment of a sum of money from the 1929 estimates would to some extent overcome this difficulty. The work of the agricultural instructor at Njala has resulted in a decided increase in length of staple, and also in producing higher yielding strains.

GOLD COAST

The cotton results in the Northern Territories were unfavourable, as the average yield was less than 30 lbs. of seed cotton per acre, and although it was better than in the previous year the return to the farmer was not satisfactory. The outlook for the future for cotton in this territory is not encouraging, as neither the rainfall nor soil-composition are really suitable, and result in an abnormal amount of boll-shedding and severe incidence of pests and diseases. Investigations will be continued next year, and the agricultural chemist will be stationed at Tamale to make a thorough study of the soil and soil conditions. At Kpeve, in Southern Togoland, experimental land of 20 acres was planted with cotton on similar lines to those carried out at Tamale. 10,938 lbs. of cotton seed was distributed in 1928 to over 60 villages, and to a large number of individual planters.

KENYA COLONY

The production of cotton in the 1928-29 season was nearly 2,000 bales, which shows a considerable increase over the previous season, when the crop was about 1,200 bales. The cotton belt in North Kavirondo, which adjoins the Eastern Province of Uganda, is virtually responsible for the whole production, and is the only area of Kenya in which cotton growing has been adopted with any serious interest. The example of the natives of Uganda is evidently being followed by the people of North Kavirondo. The district is now well served by railway and motor transport, and ample facilities for the sale of cotton are afforded by several markets, and there are ginneries within easy distance.

The revival of interest in cotton growing is reported from the coastal area, where many years ago the Association launched their first efforts to promote cotton growing in East Africa.

With the exception of the lake and coast areas, Kenya Colony as a whole is unsuitable for and unwilling to take up cotton growing, and the possibility of the cotton industry developing on a large scale is hardly to be expected.

UGANDA

The acreage under cotton for the 1928-29 season was a record for each province, as well as for the Protectorate, being —

	Acres
Eastern Province	447,130
Buganda	200 100
Northern	41 340
Western	10,230
Total	698,800

an increase of nearly one-third on the previous season's plantings, viz , 532,604 acres

The rainfall, while erratic and varying considerably in different areas, was generally sufficient to encourage a good growth of plant, but abnormal rains in a few districts caused slightly more than the usual losses through bud and boll shedding, and the early plantings running to wood, and the losses were accentuated by an outbreak of *black arm* disease over a considerable acreage in the Teso district of the Eastern Province In the early part of the season it was generally hoped that a crop of around 220,000 bales would be realized, this was based on the acreage of 617,000 acres in the 1924-25 season, which produced a crop of over 196,000 bales, but these hopes were soon reduced to an estimate of 200,000 bales

The estimate proved very near the actual figures, the export of bales for 1929 being 204,057 bales valued at £3,312,668, compared with the export for 1928 of 138,486 bales valued at £2,475,327

The 1929 export of bales is a record for the country, the previous highest figure being 196,038 bales in 1925

The tax on cotton lint exported, based on a sliding scale, was 6 cents (¾d) per lb , and realized £250,958 compared with £164,483 in 1928

Until 1917, the principal, and almost the only, market for Uganda cotton had been that of Liverpool, but during the war, when difficulties of maintaining shipments to England were experienced, Bombay became a serious competitor and, later, Japan As late as 1925 and 1926 more than half the crop was exported to Great Britain, but since then exports to the East have increased yearly, and this year (1929) India, Japan and China took 77 per cent of the crop and Great Britain about 22 per cent , the chief countries of destination for the past three years being —

	1929 bales	1928 bales	1927 bales
Great Britain	44,726	49,304	35,125
India	118 529	76,304	65,846
Japan and China	38 202	12,728	29,679
Total crop exported	204,057	138,486	131,728

Prospects are that exports of bales to India will increase considerably, Indian merchants are taking still bigger interests in the ginning industry, and in the latter part of 1929 some 30 ginneries previously owned or managed by Europeans have passed to the management of Indians, either by sales or being leased for the 1930 season It has, however, to be borne in mind that India re-exports part of its imports to both Great Britain and Japan, when markets are favourable

No new ginnery sites were granted during the year, and in view of the Report of the Commission of Enquiry into the Cotton Industry, which pointed out the uneconomic conditions under which the ginning industry was running, it is not anticipated that any further sites will be granted Of the 195 ginneries in the country, ginning and baling licences were taken out for 1[illegible]5 ginneries, 150 only working, the remainder being silent and used as buying centres, the seed cotton being sent to adjacent ginneries for ginning

A new phase in the commercial side of the industry was the advent in the 1927 28 season of seed cotton-buying associations in the Buganda Province, which was extended in 1928 29 by similar associations covering the Buganda and Northern Provinces, and parts of the Eastern Province These buying associations were combinations of ginners whose avowed objects were the fixing of prices to be paid for seed cotton at markets and ginneries, and the elimination of competition, as it was asserted by ginners that the intense competition that had prevailed for some years has made the industry unremunerative These combinations of ginners were viewed in a number of places with deep distrust by the native growers, who feared that the main object was their exploitation This distrust was so marked that grave fears were felt that there would be a marked decline in the plantings of cotton in the future, and under these circumstances the Government appointed a Commission of Enquiry into the Cotton Industry, whose terms of reference were, briefly, to find —

> "Reasonable costs of buying, ginning and exporting cotton, and to lay down a formula to ascertain what would be a fair price that could be paid the producer for his seed cotton,"

and to investigate —

> "Whether fair prices had been paid in 1927, 1928 and 1929 Whether the formation of cotton buying associations has had a prejudical or beneficial effect, and whether the Government could or should intervene "

The main recommendations of the Commission on Seed Cotton Buying Associations were to the effect that, as they considered that ginners' associations should be able to reduce the cost of buying and ginning considerably by co-operative buying and the elimination of multiplication of services, that the formation of these associations should be encouraged, but, as uncontrolled associations would be in a position to depress the price paid to growers, the possibility of exploitation should be prevented by the Government appointing a Cotton Price Control Board, who would periodically fix minimum prices

The quantity of seed distributed for planting for the 1930 season is well up to the year under review The acreage planted is approximately the same, but weather conditions up to the end of the year have been distinctly unfavourable and it is feared that a much lower crop will result

TANGANYIKA TERRITORY

Weather conditions prevailing during the planting period were generally unfavourable throughout the territory The early light rains were a failure and delayed the planting of cotton and other crops, and although heavy rains fell later when large areas were replanted, they were insufficiently prolonged to enable the young plants to withstand the hot and dry months of May to September The annual total rainfall, averaging some 40 ins, was ample, but its distribution was very uneven

The whole territory suffered more or less from an invasion of locusts, which in the coastal regions did some localized damage The Government met the situation by arranging big native attacking forces equipped with the necessary fighting apparatus. Estate owners co-operated willingly in the measures taken to combat the pest The menace was rapidly overcome and it is stated that they are now in a position to deal with any further invasion Happily locust visitations are not of frequent occurrence, that of 1929 being the first large-scale invasion for many years, but in view of the depredations of this insect in Palestine and Iraq precautionary measures in East Africa are advisable

Cotton production is down on the previous year by about 3,500 bales The actual figures are not obtainable, but are not likely to exceed 29,500 bales, against 32,965 bales for 1928 (Export 27,402 bales)

The transport of cotton and seed from the lake area has been greatly facilitated by the Tabora Mwanza section of railway, which has now been in operation for some time and should be an important factor in developing the whole area through which it passes

Tanganyika possesses a tremendous area suitable for cotton growing, but progress must necessarily be slow

Applications for seed for planting for the 1930 season have greatly exceeded all previous demands, and as the climatic conditions have been more favourable than for several years past a greatly increased crop can be looked for

NYASALAND

For the year under review there has been a healthy increase in production According to Government figures, production reached 6,095 bales against 4,469 for 1928 The native crop grown on Crown lands, which was all bought by the Association, in agreement with the Government, totalled 3,505 tons, equivalent to 5,750 bales, the balance being from European and native planters This is the biggest native crop so far produced in Nyasaland, and exceeds the previous best of 1925 by 596 tons Practically the whole of the crop is grown in the lower shire districts, where conditions favourable to development exist in the form of comparatively easy transport, dense population and a suitable climate

Cotton growing by natives is being eagerly taken up, whereas it has been almost entirely abandoned by Europeans At one period, not long ago, European production exceeded that of the natives The change over to tobacco has, however, proved somewhat of a disappointment, and renewed interest is now being shown in cotton That there is room for both products hardly needs stating, but it is unfortunate from the growers' standpoint that world prices for both cotton and tobacco are, in sympathy with all plantation products, much below the high level of recent years

Most of the native crop was purchased by the British Cotton Growing Association, in agreement with the Nyasaland Government, at a price fixed in advance. The native grower knows what he will receive for his cotton and the effect has undoubtedly been to stimulate production, which has arisen from 747 tons of seed cotton in 1923 to 3,505 tons in 1929. From a production point of view it can therefore be looked upon as successful, but it must be admitted that the Association has been called upon to take considerable risk, particularly in a period of declining prices. The agreement expires in 1930 and is then to be reviewed.

It has been decided to re-open North Nyasa for cotton growing, subject to certain precautions being strictly observed. This area has been closed since 1926 in consequence of a severe infestation of pink bollworm, from which it is now considered to be free. Up to the outbreak this district was quite a promising one, and recently some excellent results have been obtained experimentally with a variety known as "Over the Top," which may prove to be a type well suited to this particular area. On the other hand, U4, a jassid resistant variety, is more favoured by the Empire Cotton Growing Corporation, whose experimental stations at Makwapala and Port Herald are concentrating on this strain. Sufficient seed is now available to plant 250 acres, and, if all goes well, seed for planting will be available shortly on a big scale.

The progress and development of cotton in Nyasaland, as in many other countries, is linked up with transport and in this respect Nyasaland is badly off, and no actual progress can be recorded during the year. The East African Guaranteed Loan Committee recommended loans of £2,286,900 for the Zambezi Bridge and connected schemes, and further sums for lake services and roads.

The demand for planting seed for the 1930 crop has been greater than last year, and an improvement in production is expected provided other conditions continue suitable.

SOUTH AFRICA AND RHODESIA

The total crop produced in the Union of South Africa for the 1928-29 season was 3,909,344 lbs. of lint, equivalent to 9,773 bales of 400 lbs. each, which was a decrease of 1,240 bales compared with the previous season. The Department of Agriculture report that the partial failure of the crop was mainly due to adverse weather conditions. Severe drought was experienced during December, lasting to the middle of February. This, coupled with hot winds, was responsible for considerable shedding. Excessive boll-worm infestation was reported from most districts, and localized attacks by beetle in Northern Natal and parts of the Transvaal. There were very few complaints as to jassid.

Figures received from the Government Field Husbandry Officers and prominent farmers indicate that approximately 49,500 acres will be planted for the 1929-30 crop, weather conditions permitting, and the latest reports are very encouraging, good rains having fallen over the entire Cotton Belts.

Cotton under irrigation on the Orange River yielded excellent results, and the area under cultivation is being increased. Cultivators are optimistic in the Transvaal Low Veldt, Swaziland, Natal and Zululand, despite adverse conditions Jassid is no longer found owing to the excellent breeding work conducted by the Empire Cotton Growing Corporation at the Barberton Cotton-breeding Station, which is being greatly extended Boll-worm is the most serious problem which concerns the cotton industry in South Africa, and no effective remedy has yet been devised against this pest The ultimate success of cotton growing will largely depend upon the extent to which the crop can be protected from insect attacks, and upon the development of suitable rotation crops Although there have been many setbacks in the past, due to unfavourable weather and insect pests, it is considered that the industry has now been placed upon a sound footing, and that the crop will play an important part as a rotation crop in large areas in the middle and low veldt of the Transvaal

In Southern Rhodesia about 2,000 acres were planted with cotton, which was nearly double the area cultivated in the previous season About one-third of the acreage was under the new jassid-resistant variety " U4," which has been evolved at the Barberton Experiment Station, and a similar acreage was planted with another variety known as " A 12 " It is considered that the " U4 " strain has been a success upon 80 per cent or more of the 68 plots tried on different farms This seed is now being issued by the Government at 1½d per lb to farmers who wish to give it a trial, and the position which cotton is likely to occupy in the crops of the country will be better gauged after the results of the present season are known

There is an increasing feeling of optimism that Northern Rhodesia may yet take her place among the cotton-producing colonies, and provided the industry can be firmly established as a paying rotation crop it will do much to increase the stability of the whole agricultural industry The policy of the Government is to limit the acreage under cotton until such time as a suitable variety of seed can be evolved for the territory With this object in view experiments are being conducted at the Research Station at Mazubuka, in conjunction with Departments of other Governments and with the stations of the Empire Cotton Growing Corporation

Practically the only cotton produced in the territory during 1929 was that grown at the Central Research Station, and consisted of new varieties which are being tested with a view to obtaining seed suitable for local conditions The experiments up to the present time have been satisfactory, and seed has been issued to farmers in nearly all districts in order that the growth may be tested under varying conditions of altitude and temperature

SUDAN.

The areas under cotton controlled by the Sudan Plantations Syndicate Ltd and the crop produced during the year, together with the corresponding figures for the previous season, are as as follows —

	1927-28		1928-29	
	Area in Feddans	Bales	Area in Feddans	Bales
Zeidab	5,100	3,330	5,026	3,855
Gezira	105,587	77,665	131,351	108,287

The crop in the Gezira amounted to 466,160 cantars compared with 347,402 cantars for the previous season, the average yield being 3.54 cantars per feddan, against an average yield of 3.20 cantars for the previous year. The cotton was of very good quality, both in grade and staple, and was highly approved by spinners of fine Sakellarides.

The decision by Government to enlarge the Gezira Main Canal made it possible to consider the immediate development of areas alongside the Sudan Government railway to the north of the Syndicate's existing concession area. The proposed extension will consist of an area of about 100,000 feddans. After lengthy negotiations the Sudan Government have entrusted the Sudan Plantations Syndicate Ltd. with this extension on terms which it is believed will compensate them should the cotton yield turn out below the average of that obtained on their existing concession. For the 1929-30 season the area under cotton in the Gezira is 158,585 feddans. The extraordinarily heavy rains, which lasted into October, have made this season's planting a very difficult one, and much re-sowing had to be done repeatedly, which means that the crop will be a late one. Development and canalization work was started on the new northern extension, and it was hoped to complete before July, 1930, the development of about 40,000 feddans, which will add during the 1930-31 season a further 13,000 feddans to the present area under cotton.

The boundaries of the new concession in the Gezira belonging to the Kassala Cotton Co. Ltd. have been fixed in agreement with the Sudan Government, and contain approximately 46,600 feddans of cultivable land. Allotment of the land to tenants has been made in collaboration with the authorities of the Sudan Government, involving the setting into their individual holdings of some 1,500 families of native tenants. Approximately 15,500 feddans of this area was planted with cotton during the autumn of 1929, and the crop was promising well. The rapid development of this large new area is a remarkable achievement, and great credit is due to the Sudan Government for the whole-hearted efforts of their Irrigation Department and Contractors, to the Sudan Plantations Syndicate Ltd., without whose co-operation the work could not possibly have been carried out so expeditiously and economically, and to Mr. Fleming, the manager, and the other officials of the Kassala Cotton Company Limited.

The cotton crop in the Gash Delta was again exceedingly good, and the quality was excellent. The effective area cultivated with cotton was 28,537 feddans, and the yield about 71,000 cantars, which compares with 65,568 cantars from approximately 25,800 feddans for the previous season. The Gash ran for 92 days, from June 20 to September 20, and it is evident that the total area watered each year depends more upon the period of uninterrupted high flood than on the volume of water arriving during the season. Progress has been made during the year with new works for the better distribution of the flood water, and with the construction of training spurs in the neighbourhood of Kassala.

In the Tokar area of the Red Sea Province the 1928 flood was of exceptional volume, and the effective area planted with cotton in the

1928-29 season was 50,000 feddans, which yielded a crop of 46,600 cantars.

With regard to the rain-grown cotton in the southern area of the Sudan, the Government continues to provide the seed, supervise the cultivation and purchase the crop when picked, and arrange for the ginning and marketing of the cotton. Apart from the Nuba Mountain Province, where the cultivation of cotton has become more established, the industry is not developing in the manner anticipated a few years ago, but a great deal of valuable experience has been gained, and it will now be possible to concentrate on those areas which show the best prospects of development.

The total production of cotton during the year in the Sudan constituted a record and amounted to 591,508 cantars of irrigated Sakellarides, 55,152 cantars of irrigated American, and 37,620 cantars of rain-grown American, being the equivalent of about 170,000 bales of 400 lbs. each.

IRAQ

The confident prediction for a bumper crop for 1929 exceeding all previous crops has not been fulfilled. Estimates ran as high as 10,000 bales, and it is disappointing that the actual crop fell far short of this, the season's output totalling only 4,600 bales against 5,200 bales for 1928.

Expectations were well founded, for the seed issued was double that of 1928 and the area planted showed an increase of at least 50 per cent., but at the time the cotton was planted and the first two months of its growth the whole country was invaded by Najdi locusts. The direct damage was not great, but the cultivators were much afraid and failed to thin out the plants, believing that an unthinned crop would be more likely to withstand the depredations of the locusts. By the time the risk had passed it was too late for successful thinning.

During the flood season the river Tigris maintained an abnormal level for a much longer period than usual, with the result that the submerged pumps could not give the initial irrigation when it was due. A few plantations were inundated, but the indirect damage was greater, since labour was called away to do flood protection work when it should have been occupied with cotton.

The previous mild winter had allowed insect pests, particularly the spotted boll-worm, to hibernate successfully, with the result that there was an early and intense attack. The month of June was abnormally windless and this encouraged both boll-worm and aphis, and finally white fly, not previously noticed as a serious pest, contributed to the damage. This unfortunate series of disastrous events resulted in a greatly decreased yield per acre and a consequent poor crop.

Over 90 per cent. of the crop was grown on plantations irrigated by pumping engines, and many additional plants are being installed in preparation for 1930. There are now over two thousand pumping sets in Iraq, of which 332 with an average h.p. of 37 were installed in 1929.

Cotton cultivation in the Mosul area continues to increase in spite of the difficulties of transport, although the area as yet is not important

The whole of the Iraq cotton crop was ginned and baled by the British Cotton Growing Association, all cotton coming directly into their hands is also graded and classified Under Iraqi auspices a new National Co operative Ginnery has now been erected, but was not completed in time to deal with any of the 1929 crop

The control and distribution of cotton seed which is a duty left to the Association, has been carried out satisfactorily Notwithstanding the serious setback in production, the applications for planting seed for the coming season exceed those of last year

With the increased adoption of pumps, the problem of watering and irrigation of lands becomes yearly less difficult, but the locust peril is always present and is a constant menace to the cultivator It is therefore hazardous to venture on any prediction as to the size of the crop

AUSTRALIA

It has been decided by the Queensland Government to guarantee to cotton growers an average price of 5d per lb of seed cotton for the crop resulting from the coming season's planting This decision covers one year only, and the liability of the Government in the guarantee will be limited to a maximum of £30,000 This assistance, it is stated, has the sole object of tiding growers over the period of uncertainty arising because of the matters awaiting decision by the Federal Government The extent of the production upon which the subsidy is to be available will be a maximum of 10,000 bales, which, it is understood, based on the acreage of the last two seasons, may be taken as the normal development, and that 10,000 bales may be regarded as a reasonable estimate of the potential production on the basis of the existing acreages being maintained

In 1927 the whole of the Queensland crop was sold to Australian spinners, but the following year 80 per cent of the crop was shipped to Liverpool It is understood that arrangements are being made for the establishment of cotton mills in Brisbane and Rockhampton

The weather conditions in Central Queensland have been unfavourable for the 1929 crop, except in a few favoured spots The drought of 1928 continued until late in November, and planting was carried out extremely late There was ample rainfall, following the drought, and the more or less weekly falls caused great difficulty to the growers in the eradication of weeds Early frost in April damaged the top crop, and in some cases portions of the middle crop, which will not be harvested, and as far as can be estimated the crop will not exceed 4,000 bales for the Central District It is expected that the change of Government in Queensland, and its attitude in regard to perpetual leasehold, will have a stimulating effect upon next season's crop, and the downward tendency of wheat prices will check the anticipated wheat growing in the cotton section, and therefore increase the cotton crop considerably

APPROXIMATE ESTIMATE OF COTTON GROWN IN NEW FIELDS IN THE BRITISH EMPIRE

(bales of 400 lbs.)

	1923	1924	1925	1926	1927	1928	1929
Gold Coast	1,000	3,000	600	100	100	100	100
Nigeria—							
Southern Provinces ..	5,000	7,600	10,300	9,400	10,000	4,300	7 200
Northern Provinces ..	13,900	16,400	29,300	39,500	15,400	20,600	23,500
West Africa	19,900	27,000	40,200	49,000	25,500	25,000	30 800
Uganda Protectorate ..	85,000	128,600	196,000*	180,900*	132,000*	138,500	204 000*
Kenya Colony	1 200	1,300	2,300	300*	1,200*	650	2,000
Tanganyika Territory ..	11,400	17,500	25,200*	27,400*	22 000	27,400*	29 500
Nyasaland and Rhodesia ..	6,500	8,700	13,100	14,900	5,600	4,600	6 500
Union of South Africa ..	6,000	8,700	18,800	20,400	10,200	11 000	9 800
East, Central and South Africa ..	110,100	164,800	255,400	243,900	171,000	182,150	251,800
Sudan	28,000	46,100	42,700*	122,100*	158,900*	129,200*	170,000
West Indies	5,000	5 000	4,900*	5,800*	5,700	5,000	5 500
Australia	9,000	10,500	15,000	9,000	6,000	8,500	6,000
Iraq	1,500	2,500	2,500	3,500	1,800	5,200	4,600
Fiji	100	200	200	1,000	1,000	1,000	300
Sundries	5,900	5,800	5,800	5,000	5,000	3,500	3,500
Total	179,500	261,900	366,700	439,300	374,900	359,550	472,500
Approximate value ..	£5,529,500	£8,373,200	£9,732,600	£9,301,300	£9,412,000	£9,386,000	£11,284,500

In addition there has been a production of improved long-stapled cotton in the Punjab during 1928–9 of 187,000 bales

* denotes exports.

AMERICAN COMPLIMENT TO COTTON-GROWING EFFORTS IN NEW COUNTRIES.

Mr W. L. Clayton, of Anderson, Clayton and Co, Houston, Texas, the outstanding cotton personality of U S A, in a pamphlet entitled "What Congress can do for the Cotton Farmer," states on page 6: "It is quite clear, if we continue in the direction in which we are moving, that it is only a question of another generation or so until we shall have lost to other countries substantially all of our export trade in raw cotton" This, indeed, is great encouragement to other countries, a first rate acknowledgment of work well done by the Colonial Cotton Growing Associations and a contrast to the statements made at the Atlanta Cotton Congress in 1907, when American cotton farmers ridiculed the efforts that were being made in the Colonies and dependencies of European countries and when in every State the Delegates were told in most emphatic language that their State was the only one which God had destined to bring forth cotton"

Mr. W L Clayton suggests that the most practicable plan to help the American cotton farmer is to establish an export bounty of two cents per pound, which would cost the U.S.A. $80,000,000 per year for cotton alone, but, of course, producers of other export crops would want export bounties.

BULGARIA.

The cotton area this year is estimated at 14,300 acres against 13,200 in 1929 and 9,200, the average for the previous five years Percentages: 108 2 and 156.2. Weather conditions during May favoured the crops, condition of which, according to the International Institute of Agriculture, was 100 on June 1.

HAITI.

According to advices received, the weather conditions in Haiti have been favourable for the 1930 cotton crop, and it is generally believed that it will slightly exceed the 1929 production

MEXICO.

The total ginnings up to April 4 in the Mexicali district amounted to approximately 74,000 bales, according to local growers. No definite information is available as yet regarding the acreage to be planted in the above district for the coming year. It is believed, however, that there will be considerably less planted than in former years. (*U.S.D.A.**)

* *U.S.D.A. - U.S. Department of Agriculture.*

NICARAGUA.

COTTON EXPORTS.

For the first time in several years cotton appears among the exports of Nicaragua, about 280 bales having been shipped to Liverpool during the first quarter of this calendar year. (*U.S.D.A.*)

NIGERIA.

Production of ginned cotton during the season is estimated at 160,000 centals (33,000 bales) against 128,000 (27,000) in 1928-29 and 129,000 (27,000), the average for the preceding five years. Percentages: 124.8 and 124.1. (*I.I.A.*)*

* *I.I.A.—International Institute of Agriculture, Rome.*

SUDAN.

The Department of Agriculture and Forests of the Sudan Government published in June the following Cotton Progress Report for the month of May, 1930.

SEASON 1929-30.

Variety	Area under crop Feddans	Picked to date kantars of 315 rottles	Estimated total yield kantars of 315 rottles
Gezira Sakel	174,000	... 405,670	... 405,670
Tokar Sakel	45,000	... 54,615	... 54,615
Kassala Sakel	55,500	... 80,000	... 83,000
Shambat, Kamlin and Ducim Sakel ...	843	... 2,668	... 2,668
Private Estates Sakel	3,960	... 5,500	... 9,000
Total Sakel ...	279,303	... 548,453	... 554,953
Irrigated American ...	17,641	... 50,376	... 51,348
Rain-grown ,, ...	58,650	... 67,925	... 67,925

TURKEY.

COTTON CROP OF 1930.

At the end of April the indications for the 1930 crop in the Smyrna district was estimated to be 25 per cent. larger than last year. A yield of 45,000 to 50,000 bales of about 400 pounds each is expected. (*U.S.D.A.*)

U.S.S.R.

According to the preliminary data published by the Agricultural Commissariat the area sown with cotton in the present season up to June 5 was 4,150,000 acres. It should be recollected that the area harvested last season was 2,560,000 acres and the five-year average of 1924-25 to 1928-29 is 1,694,000 acres.

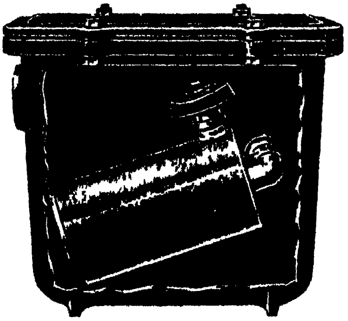
During the first three weeks of May weather conditions were favourable in the cotton areas of Central Asia.

(*I.I.A.*)

UNION OF SOUTH AFRICA.

Production of ginned cotton in 1929-30 is estimated at 51,000 centals (10,700 bales), therefore exceeding by 31 per cent. that of 1928-29, which amounted to 39,000 centals (8,200 bales).

(*I.I.A*)



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Cotton Crop 1929-30, Revised Figures.

The United States Department of Agriculture, on 20th May last, issued revised figures for the acreage planted and harvested and the yield of cotton in the United States for 1929. The area planted was returned at 47,067,000 acres, against 46,946,000 acres in the previous year. The area picked was given as 45,793,000 acres, against 45,341,000 acres in the previous season. The yield per acre is returned at 155 lbs., against 152.9 lbs. in 1928, with the total production at 14,828,000 bales, against 14,919,000 bales, the December estimate, and 14,478,000 bales, the revised estimate for the crop grown in 1928.

It should be noted that not included in the United States totals are 151,000 acres planted in Lower California, from which 75,000 bales were harvested, against 160,000 acres planted and 80,000 bales picked in the previous season.

The production details by States are as follows in running bales of 500 lbs. gross:

	1929.	1928.
Virginia	48,000	44,000
North Carolina	747,000	836,000
South Carolina	830,000	726,000
Georgia	1,343,000	1,030,000
Florida	29,000	19,000
Missouri	220,000	147,000
Tennessee	515,000	428,000
Alabama	1,342,000	1,109,000
Mississippi	1,915,000	1,475,000
Louisiana	809,000	691,000
Texas	3,940,000	5,106,000
Oklahoma	1,143,000	1,203,000
Arkansas	1,435,000	1,248,000
New Mexico	90,000	88,000
Arizona	153,000	149,000
California	260,000	172,000
Other States	9,000	7,000
Total	14,828,000	14,478,000

The following are the acreage details (in thousands of acres):—

	1929		—	
		Harvested.	Planted.	Harvested.
Virginia	89	88	81	79
North Carolina	1,916	1,878	1,892	1,860
South Carolina	2,273	2,216	2,485	2,361
Georgia	3,818	3,753	3,883	3,728
Florida	96	94	101	95
Missouri	348	341	355	334
Tennessee	1,147	1,136	1,145	1,107
Alabama	3,727	3,690	3,643	3,534
Mississippi	4,229	4,166	4,154	4,029
Louisiana	2,135	2,114	2,052	1,990
Texas	18,229	17,500	18,330	17,743
Oklahoma	4,430	4,275	4,420	4,243
Arkansas	3,933	3,858	3,834	3,681
New Mexico	132	130	123	117
Arizona	227	226	202	200
California	319	309	223	218
Other States	19	19	23	22
Total	47,067	45,793	46,946	45,341

The estimate of area planted issued in September, 1929, was given as 46,594,000 acres as against 47,067,000, while the earlier estimate of area harvested was placed at 45,981,000 in December last as compared with 45,793,000 estimated in May.

American Cotton Crop, 1930-31.

OFFICIAL ACREAGE FIGURES.

The report issued July 8, by the United States Department of Agriculture on the acreage of cotton under cultivation on July 1 indicated a decrease of 2.7 per cent. on the area planted last year, the total being returned at 45,815,000 acres, against 47,067,000 acres last year, 46,946,000 acres in 1928, and 41,905,000 acres in 1927. The revised estimate of our area planted in 1929 and issued in September, 1929, was given as 46,594,000 acres. Lower California is estimated to have 101,000 acres under cotton, compared with 151,000 acres last year, but these are not included in the United States total.

The State details show reductions of 729,000 acres in Texas, 354,000 acres in Oklahoma, 75,000 acres in Alabama, 68,000 acres in South Carolina, 64,000 acres in Louisiana, 46,000 acres in California, and 15,000 acres in Arizona. On the other hand, increases are shown of 85,000 acres in Mississippi, 80,000 acres in Tennessee, 79,000 acres in Arkansas, 35,000 acres in Missouri, and 10,000 acres in Florida.

The following table gives details by States, with comparisons (in thousands of acres):—

	1930	1929	1928	1927
Virginia	90	89	81	65
North Carolina	1,724	1,916	1,892	1,749
South Carolina	2,205	2,273	2,485	2,454
Georgia	3,818	3,818	3,883	3,501

	1930	1929	1928	1927
Florida	106	96	101	67
Missouri	383	348	355	305
Tennessee	1,227	1,147	1,145	985
Alabama	3,652	3,727	3,643	3,214
Mississippi	4,314	4,229	4,154	3,408
Louisiana	2,071	2,135	2,052	1,585
Texas	17,500	18,229	18,330	16,850
Oklahoma	4,076	4,430	4,420	4,187
Arkansas	4,012	3,933	3 834	3,142
New Mexico	133	132	123	100
Arizona	212	227	202	140
California	273	319	223	130
Other States	19	19	23	23
Total	45,815	47.067	46.946	41,905

U.S. GOVERNMENT COTTON REPORTS ERRATUM.

Our attention has been drawn to a slight error which took place in the compilation of the card issued by us in April, giving the list of the issuance of U.S. Government Cotton Crop Reports.

Under "Ginning Reports" the words "in running bales of 478 lbs." should read "in running bales."

It should also be noted that no October Condition Report will be issued in 1930. Only figures giving probable production in that month will be published.

COTTON ROOT ROT.

A State-wide survey of species of plants subject to root rot has been carried on during a period of several years. Root rot causes considerable losses to Texas cotton farmers, especially on the rich black "waxy" soils. Both cultivated and non-cultivated plants have been examined for symptoms. Final diagnosis has been based on the presence of the parasite on the root systems. The plants designated as resistant have either been specially treated and found resistant or have remained healthy in locations where root rot was destructive.

Among the cultivated plants there are many showing high susceptibility. These include many of the important field crops, tree and bush fruits, ornamental trees, shrubs, and vegetables. 274 cultivated species are listed as susceptible.

Native vegetation, in the limited number of cases studied, has carried root rot and apparently has been the source of the disease in the first crop grown after the breaking of the land. Susceptible species in fence-rows, waste places, and meadows were found to be infected, indicating that the fungus may be carried over from year to year on weeds in these locations.

The total number of susceptible species is very large, some 527 species being named in the tables. This large range of host plants makes the disease extremely important; moreover, when the value of the economic species attacked is considered, it is evident that root rot should be considered one of the most serious plant diseases known to science.

Further studies on cotton root rot at Greenville, Texas, during the period 1920-27, showed that the spread of the root rot infection was due to the expansion of the original areas rather than to the development of new areas. Where cotton was grown continuously in the same soil the infected areas increased about three fold in size in the eight years. The disease apparently spread across rows at about the same rate as along the row, and no indication was seen that tillage practices spread the infection.

Concerning the depth to which the organism penetrates the soil, active mycelium was found on cotton roots down to 26 in., but it is thought that the major infection occurs within the upper 15 in. The progress of the disease was stopped by a narrow trench 24 in. in depth, but a 12 in. excavation was not fully successful. Clean fallow over a two-year period gave promising control results, but one year's fallow sufficed only to delay the onset of the disease. A combination of fallow and non-susceptible crops is believed promising. In 1926, following a humid summer and fall, there was a heavy production of spores.

COTTON GINNING.

A device has recently been placed on the market in U.S.A. which dries out any damp or green seed cotton before being fed to the gin.

Cotton is fed into the drier from the wagon with the usual air suction through an unloader. The drying tube is 40 feet long and about 5 feet in diameter. This tube revolves slowly. Heated air from an oil or gas-burning furnace is forced through the tube by a fan. The tube is equipped with shelves. As the tube revolves the wet cotton is simply carried to the top of the tube on the shelves. It naturally drops off and falls through the hot air stream.

Regardless of the moisture content of the seed cotton fed into this machine, it will automatically discharge uniformly dry cotton at the discharge end. The drying tube is higher at the discharge end and the hot air stream is regulated so that dry cotton is carried up hill toward the discharge end while wet cotton remains in the machine until dry. Cotton will not discharge from the tube until it is of the same specific gravity as dry cotton.

It is estimated that from five to eight million bales of cotton are injured each year due to ginning seed cotton while too moist. Early pickings are rushed to the gins and the cotton is frequently green and sappy. The seed cotton has been picked in the fields under conditions of high humidity and heavy morning dews. The fibre feels sticky to the touch. This seed cotton mats and ropes in the cleaners. Leaf matter is damp and cannot be removed. The staple is often badly nepped, twisted and mutilated. Lower grades result in losses up to $15 a bale. Similar conditions prevail at the gin when the later season cotton is wet from dews, fogs or rain.

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COTTON GINNING EXPERIMENTS.

Advices to hand state that President Hoover has asked an appropriation of $100 000 to carry out the provisions of the law signed on April 21 to establish an experimental cotton ginning laboratory.

According to experts of the Government the damage to the American crop due to improper and antiquated machinery is upwards of $50,000,000 a year.

One of the evils of the present situation is out-of-date and poorly kept gin machinery. The South has something like twelve or thirteen thousand cotton gins and probably more than one half of these are of a vintage which makes them undesirable, resulting in gin-cut cotton, and lowered value.

Another evil is over-feeding of a gin during the height of the picking season. Feeding the gin too fast results in improper ginning.

The Empire Cotton Growing Review for July contains an illuminating article entitled "Ginning Technique and Cotton Quality," by H. Spibey.

We extract the following from this paper:

It is important to note that special conditions are necessary for each distinct staple and grade of lint, and the setting of the saws must be modified accordingly. If this fact alone were rigidly attended to, many of the defects wrongly attributed to the gin would immediately disappear. If ginning is performed with a high density feed and the saw-teeth in a blunt condition, the faults of nepping and cutting will occur, and particularly if a high saw speed is attempted. Although the importance of attention to saw teeth is becoming more generally realized, in many ginning centres the employment of saw sharpening tools is very rarely practised, and in consequence the lint suffers. The correction of saw disc eccentricity is likewise important and even though special tools are available their use is very often neglected, with the result that the mote content appreciably increases, a greater proportion of seed passes forward with the ginned lint, and cutting may become more accentuated. Attention to such factors makes for satisfactory and efficient ginning, as can readily be seen from an analysis of the lint. The improvements which have been made in recent years in feeding methods and the installation of cleaners, etc., have greatly helped to reduce the amount of damage sustained by the saw discs on account of the presence of hard substances in the seed cotton. Nevertheless, many things are normally done in the ginning process which disturb the parallelism and correct setting of grids and discs, and render periodic and frequent supervision essential.

WEIGHT OF COTTON BALES.

Mr. H. G. Hester, secretary of the New Orleans Cotton Exchange, reports that the average weights of cotton handled at ports and overland from August 1 to close April were as follows:—

	1930				1929
	Number in bales		Average weights lbs.		Average weights lbs.
Texas .	5,259,140	...	534·07	...	533·34
Louisiana	1,577,901	...	528·36	...	525·82
Alabama, etc. . .	413,402	...	523·49	. .	524·51
Georgia	457,500	...	514·11	...	508·75
South Carolina ..	187,680	...	496	...	496
North Carolina . .	91,358	...	489	...	486
Virginia	143,731	...	500	...	500
*Tennessee, etc. ...	1,138,899	...	526·91	...	519·29
Total nine months	9,269,611	...	528·91	...	527·45
August, September, October, November, December, January, February & March ...	8,973,239	...	531·47	...	527·98

*Average weights based on returns from Memphis and St. Louis. Memphis average 530·24 against 524.06 last year; St. Louis 500 against 500.

The Federal Farm Board.

MR. H. G. SAFFORD, President of the American Cotton Shippers' Association, delivered an excellent address at the opening session of the above association's annual conference at Memphis, last April, on the activities of the Federal Farm Board.

With the signing of the Agricultural Marketing Act by the President on June 15, 1929, and the subsequent appointment of the Federal Farm Board and the organization of the A.C.C.A. with a capital of $30,000,000.00, there entered into the scheme of things an entirely new factor: one which may and probably will become one of the dominant units in the cotton industry. We, as merchants, are deeply concerned in that the A.C.C.A. is, in connection with its principals, the regional Co-operatives, interested in price levels and not in the basis, our great problem. We are disturbed over the probable effect of its activities in the futures markets, whose hedging facilities have alone made possible our merchandising activities as now conducted. The manufacturers, too, are dependent on the futures market for their hedge against warehouse stocks, and they are fearful of the fundamental changes possible under the new regime. We use the futures markets for price insurance during the process of handling, and any influences that disturb the value of this insurance bring loss and trouble to all of us, and through us inevitably affect prices paid to the growers. We could wish that Congress had not limited the benefits of the provisions of the Agricultural Marketing Act to the members

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of Co-operatives, as this membership includes at present less than ten per cent. of our cotton farmers. Some of the remaining ninety per cent. will not join these associations through disinclination to give up their own initiative and individuality; others, who perhaps need help most, will be unable to join on account of debts and financial or business obligations which forbid, but the Farm Board is a creature of the Act and must be guided exactly by its terms. In any conjectures we may make into its future activities we are naturally influenced in our conclusions by its course to date, which we can profitably review.

The Board commenced to function only in the late fall months. They found business conditions badly upset everywhere by the collapse of the stock market. Cotton prices were gradually going lower under pressure of a crop only slightly larger than world requirements. Although the Farm Board disclaimed any interest in this year's crop, pressure from Congress, and above all the desire of preserving these Co-operative Associations for the future, prompted it to give immediate financial aid in the form of loans. During the subsequent decline in the market of over three cents per pound, these loans alone saved the Co-operative Associations from ruin. During this decline they continued to sell cotton as the opportunity offered—fixed their prices and bought contracts. The result of these operations was to leave them long several hundred thousand bales of the near months. These long contracts have been firmly held and have been the means of changing the former discounts of the near months under the distant months to enormous premiums over them. It is probably true that these operations were conceived for the purpose of preserving the existing Co-operative Associations for future usefulness, but they have caused heavy losses to both the merchants and to the mills who, for the most part, had their stocks of cotton hedged in the near months. Although we have seen similar operations in the futures markets before, it is to be hoped that the Farm Board may not find them necessary in the future, as losses attributable to a Government agency seem particularly unjust. Such then is the brief history of the actions of the Farm Board to date.

Representatives of the cotton trade have had several meetings with Mr. Legge and Mr. Williams in which many questions have been asked and few of them answered, probably because a definite policy had not been outlined and they did not feel certain enough of their own ground to give definite answers. Above all, cotton merchants are keen to know if, or not, they have any place in this new scheme of things. The Farm Board says that the law is mandatory in making the Co-operatives, and the farmers through them, their only consideration, but that they have no disposition or wish to hurt the legitimate cotton merchant, and that if injury comes to him through any of their operations for the farmer they will be sorry. I am hoping, as they realize more fully the magnitude of the task ahead of them regarding cotton, that they will see their interest in the cotton merchant to be much greater than they would believe, and that his health and welfare are necessary to their own success in bringing aid to the farmer. At their own liberal estimates they do not expect the Co-operatives and the A. C. C. A. to handle during the next few years more than fifteen to twenty per cent of the cotton crop, leaving eighty to eighty-five per cent to be handled by the cotton merchants, as in the past.

There is much misunderstanding of the functions of a cotton merchant in the minds of many people, especially in Congress. Many there are of the opinion that we make our profits by depressing prices in order to buy cheaply and try to advance prices in order to sell dearly, and therefore it was perhaps to be expected that in the wording and the framing of the Act itself any consideration or mention of either the rights as citizens or the services rendered by merchants was conspicuous by its absence. As has been said on other occasions, our reason for existence is that we render a highly specialized skilled service to both growers and mills, and it is for this service primarily that we are paid. It must be clearly stated and remembered that the industry cannot dispense with the skilled service which we render, and that someone must continue to render it. No agency in the past has been able to give this service as cheaply as we have done. If our business is so disorganized and so dangerous and uncertain—if our hedge has been destroyed in the futures markets to the extent that we can buy only on order from the mills (buying likewise from hand to mouth) we cannot continue to offer a home to the hundreds of thousands of bales thrown each week on the open market during the heavy ginning periods of the fall months. In other words, if they destroy the confidence of those who buy the futures contracts, either for speculation or investment, and if they destroy our ability to buy, warehouse and hedge the temporary surpluses of spot cotton, they have removed the strongest existing, sustaining and stabilizing influence, and in its place they cannot supply an adequate substitute. One can imagine a deplorable demoralization of prices in such circumstances—all to the vital injury of the farmer and the discredit of the Farm Board. So, then, I am confident that more thorough consideration and counsel will convince the Farm Board that they are indeed interested in our general health and well-being, and that more can be gained for the farmer by a policy of inviting co-operation from us than by one of total indifference to us.

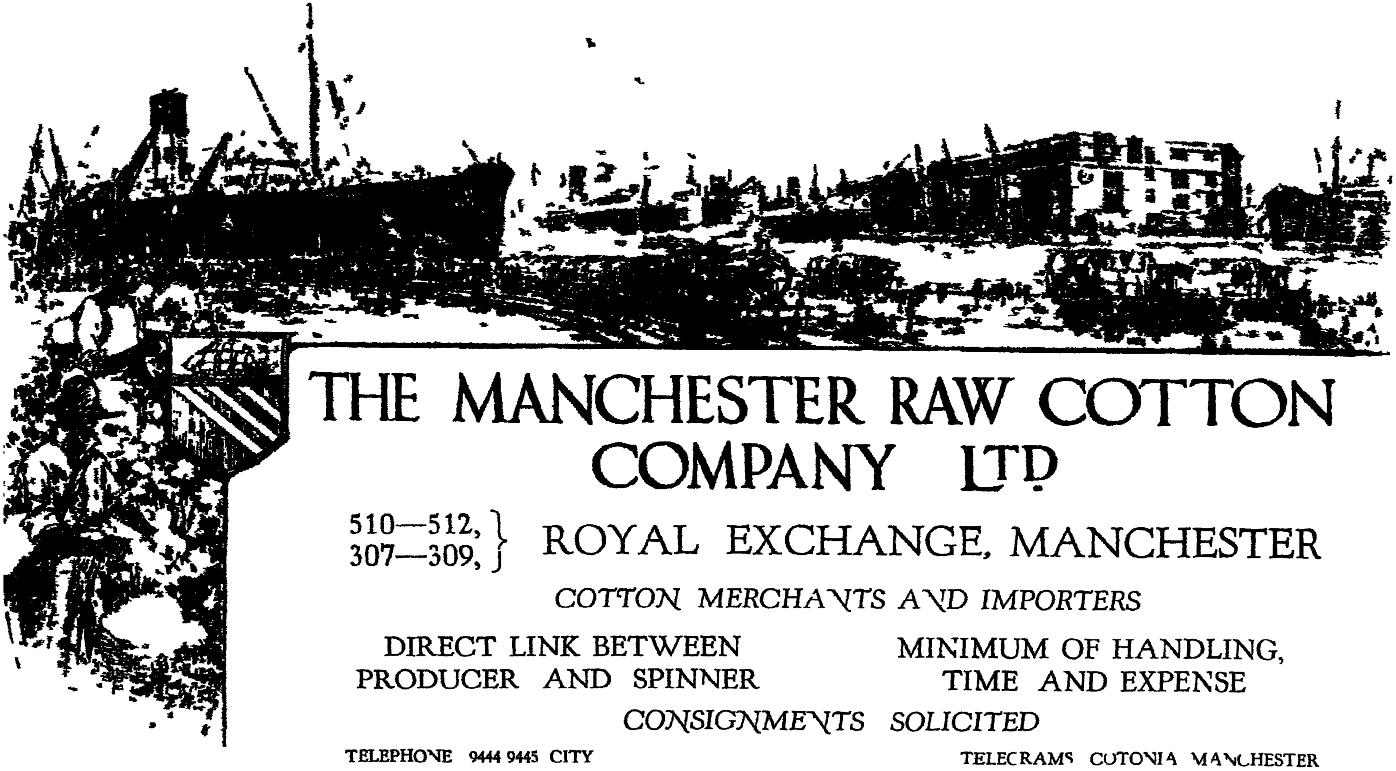
At best, the cotton merchant is facing many new problems in buying, hedging and merchandising his cotton. We see as a competitor an organization of $30,000,000.00 capital, with the unlimited financial backing of the U. S. Government, which can indulge in market operations of greater magnitude than any we have seen in the past. The most disturbing feature of this new arrival is that it is not concerned to any great degree with the basis, but vitally concerned with the price level, thus reversing our own opposition and attitude. Price levels have been of lesser consequence, the basis, i. e., the spread between the futures price and our buying and selling price, and its fluctuations are of the greatest and controlling importance to us. We have been content to let supply and demand govern prices, while the very reason for existence of the new corporation is the determination of Congress to control prices through its activities. How can the two theories be made to work harmoniously side by side? This question must be answered successfully Not only for our own personal selfish interest, but for the good of all in any way connected with the cotton industry It must be made possible for a merchant to buy and hedge a stock of cotton with only the usual attendant risks to which he has been accustomed in the past These risks have always been serious enough to discourage any except the most competent and financially sound organizations from such undertakings Further risks will forbid them, and leave the entire support of the spot markets to the A C C A, which is incapable alone of even beginning to supply the support which will have been withdrawn

Before the war our merchants were not called upon to carry huge stocks of cotton during entire seasons and from one season to another, the crop passed through their hands very quickly during the first five or six months of the cotton season, and it was often the case, in those days of pleasant memory, that we were through with practically all our business by the first of January or February The domestic mills, the merchants in Liverpool, Havre, Bremen and other foreign ports carried the bulk of the stocks Our factors also held for the owners hundreds of thousands of bales to be marketed gradually through the last half of the season as demand became active Since the war high money rates and lack of credit, accompanied by very disturbed general business conditions, have made it impossible for our foreign friends to amass the great stocks of cotton usual before 1914 This burden had to be assumed by someone, and our merchants undertook the job The necessity of this work is still with us The Co-operative Associations can do a part of it, but at best only a small part It must be made safe for us to continue the balance of the undertaking One does not need to question either the motive or the action itself involving the May and July options in the domestic futures markets, he needs only to call attention to it and the result to spot merchants carrying stocks, to show conclusively that even the possibility of frequent repetitions would forbid any merchant, with his own money to lose, from ever attempting to carry a stock of cotton again In other words, to avoid chaos in the heavy marketing period of the fall months, if the Co-operatives and the A C C A do not so conduct their affairs that we can function safely and take our part of the marketing and carrying load, they must be prepared to alone take over the whole job or assume the responsibility for the consequences I cannot doubt but that their course will be the same one

Some of our members believe the Federal Marketing Act doomed to ultimate failure, others see possibilities of great good under careful and conservative administration, but all have, so far, refrained from active opposition or obstructionist tactics, thinking the fair thing to do is to give it a chance We are not now, nor have we ever been, antagonistic to the Co-operative Associations, as such, we recognize the useful part they can play in assisting in the orderly marketing of the crop They have possibilities of great usefulness as a means of spreading sound educational information through their speakers and publications It may be stated as a fact, without danger of contradiction, that they have not lived up to these possibilities in the past They have been inefficient in the extreme their overhead charges per bale have been two or three times those of the average cotton merchant They have been too busy in trying, in vain to bull the market to pursue the orderly marketing programme which was their purpose of organization and very reason of existence And here, I may perhaps say no Co-operative Association which is unwilling to publish an audit of its books should be allowed to solicit new members When a new member joins a Co-operative Association so I am informed he becomes a shareholder in the Association in exact proportion as the number of bales he gives in bears to the total bales handled In justice to themselves and to the farmers the Co-operatives should publish full open audits of their affairs and should not accept new members until they do so We cordially hope that their future course may be along more sound economic lines, for economic laws cannot be neglected indefinitely Neglect of sound business principles will ruin them eventually, even though they are backed by public money for the taxpayer will will ultimately refuse to have his money squandered uselessly

There seems every prospect that the Agricultural Marketing Act Federal Farm Board and the A C C A will be with us for at least a number of years, in case of success, until possibilities of usefulness have passed and in case of non-success until failure has been fully demonstrated A dislike for them and a distrust of them, if held are not good reasons for a failure on our part to do our utmost to adjust ourselves to the inescapable fact of their existence, and to build up such contacts with these organizations as will allow us both to function to our own best selfish advantage and to their further usefulness Only thus can the greater public good be served I do not mean that we should be silent in the face of unnecessary injuries or palpable injustices As citizens, if not as cotton merchants, we not only have the right, but it is our duty as well to resent wrongs especially from a Government agency, and to demand their prompt correction We have a right to expect that a spirit of fair play on our part will engender a like spirit on theirs, that all purposes and policies will be openly declared and explained and that the doors will be left open for honest and candid criticism and that mistakes will be cheerfully corrected The recent appointment of our mutual friend, Mr E F Creekmore, as general manager of the A C C A is a sufficient guarantee that such a course will meet with a ready response there

We do not question the ability of the Farm Board acting with Co-operative Associations to aid materially in the orderly marketing of the cotton crop, to withhold their stock when the markets are glutted, and to offer it when offerings are scarce This course will not only aid their own members in securing better prices, but will aid all other growers of cotton as well, but we do not believe that they can market the cotton as cheaply as the cotton merchant, and until they can demonstrate their ability to do so they should certainly not discriminate against us in selling their cotton We know that the Co-operative costs have been much higher than our



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own for similar services. Complaints against the present programme of farm relief should in justice be directed against the law itself and the Congress which passed it, rather than against the Farm Board, which must be governed by its mandatory provisions. These provisions limit its use of money entirely to marketing activities in the one case to loans to the Co-operative Associations and, in the only other alternative, to the establishment of stabilization corporations which must be concerned alone with buying, holding and selling the particular commodity in question. The expenditure of money in no other direct manner or for no other direct purpose is allowed.

I believe that the Farm Board has a great field of usefulness, not so much in the simple marketing of cotton, but in the greater field of farm education. The campaign for acreage reduction in cotton is fine, but it is only the first step in the right direction. The farmer should be shown how to profitably replace cotton with other crops. If farmers are to receive loans from the federal treasury, should not all farmers receive their benefits, and should not the programme be complete in aiding them to so round out the farm products that they will soon become independent of all outside relief?

A very few years ago storms and floods destroyed most of the planting seed in certain parts of the south-eastern Cotton Belt, loans were made under Acts of Congress to enable the cotton farmers to buy seed for replanting. The disaster that ruined the seed for planting has proven a blessing in disguise, and those who had the expenditure of the money in hand and who purchased the new seed deserve a vote of public thanks. The new seed purchased was good seed, and it replaced for the most part very poor seed. The result has been a quality of cotton unknown for a great many years. It has been an object lesson in the profitableness of planting good seed and raising quality cotton. There are many sections of our country, especially in the Western Belt, where object lessons of this kind are sorely needed. Cannot Congress change the law in such a manner as may enable the Farm Board to loan money to others than members of Co-operatives for the purpose of replacing poor seed with good seed? This would be a real help, as the decline in the quality of our exportable surplus is alarming and is enabling foreign growths to make serious inroads into our trade everywhere, especially in Great Britain, Germany, France and Italy. We are about to lose good customers.

The suggestion I am making has no element of romance in it, no promise of high prices and a life of ease for the farmer. It entails twelve months of work for the cotton farmer instead of three, as is the case with most of those who are calling loudly at present for relief. The great problem of most cotton farmers is not so much a matter of prices as it is of industry and intelligent farming methods. A cotton crop entails about three months' real work on the average, many, very many, farm owners and renters largely confine their working days each year to this three months and expect to receive a sufficiently high price for their product to enable them to spend the other nine months of the year in comparative idleness. They plant only cotton, buy all their vegetables and their milk in cans, and even their eggs and meat from the corner grocery. The real problem for the cotton farmer is not how to get higher and higher prices but how to raise better cotton cheaper and still raise it at a profit Foreign competition will certainly force him to do this or to quit raising any cotton for export In view of our high tariff system the only way to do this is to become almost completely self sustaining at home, to own himself and not to owe everybody who will permit him to borrow To make cotton his surplus crop, to raise his own vegetables and fruits in his own garden, and to can enough for winter use To have his own chickens and raise their feed, to have one or two cows and have his own milk, butter and cheese to own a few pigs and raise their feed—and, thus have his own lard bacon and ham, to feed his working horses and mules altogether from his own farm to terrace and fertilize his land intelligently and to preserve and increase its fertility by a proper rotation of crops This course will make his cotton a surplus crop give him more cotton on fewer acres, it will make his crop a surer one, it will make him independent of the banks—a depositor instead of a borrower, perpetually behind in his payments It has done this for thousands of outstanding farmers of whom some are to be found in every community, men respected and honoured wherever found But it has entailed intelligent, constant work, it has meant staying at home each night and morning to look after the chickens, the cows, the pigs and the mules

To bring this message of lasting farm relief and prosperity through every possible means of contact and demonstration to every untrained and inefficient farmer in the country is the real opportunity open to the Farm Board and the Co-operatives through them, all other devices are palliatives—this is the only real cure to show the farmer how to help himself

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The American Cotton Co-operative Association and the Cotton Stabilisation Corporation have selected New Orleans as their headquarters Mr E F Creekmore, formerly of Fort Smith, Arkansas, Vice-President and General Manager of the former organization, has been appointed head of the Cotton Stabilisation Corporation

The A C C A has a capital of $30,000,000, and it is stated that $50,000,000 of loans from the Federal Government will be necessary to finance the Cotton Stabilisation Corporation

Hedging Part of the Basis.

Mr E A Beveridge, writing in *Commerce and Finance* of July 2, suggests a method by means of which cotton traders may hedge part of the basis

It is probably safe to say that hedging in the cotton market consists invariably of measures of protection against adverse changes in the price level only This kind of protection is sought by the mill, the producer, and the merchant The first two, however, are more concerned with fluctuations in the price level, whereas the merchant is more concerned with fluctuations in the "basis," this term referring, of course, to the difference between spots and futures for it is these fluctuations in the basis that bring him his profit or his loss. In spite of the thought given to the subject, no effective means as far as the writer knows have been found for hedging the basis. Yet it is possible to hedge that part of the change in basis that is attributable to a change in grade differences due to fluctuations in the price level. The latter, of course, is only one of the causes of changes in the basis.

To show how it is possible to hedge against such adverse changes in grade differences, an actual example is here given. Suppose a merchant buys 1,000 bales of low middling at 18 cents, that is, at 2 cents, or 10 per cent below the price of middling, 20 cents. This percentage, or differential, denotes the market's idea of the loss from waste, etc., in using low middling as compared with middling cotton. It is in this instance placed at an even 10 per cent to make the calculation simpler. This percentage figure remains about the same as the price level alters. Let us assume, however, it will remain exactly at 10 per cent in this example. The merchant would most probably hedge his purchase by selling 1,000 bales of futures. This, at least, is the general practice. He would, therefore, sell 1,000 bales of futures at, say, 19.50 cents, futures being, let us say, 50 points under spots. He thus would apparently have a properly hedged or balanced position. Nevertheless, if middling spots rose to 30 cents, which would make low middling 10 per cent less, or 27 cents, and if futures maintained the same parity with spots and advanced to 29.50 cents, his spot cotton would show a profit of 9 cents, or $45,000, while his futures would show a loss of 10 cents, or $50,000, a net loss of $5,000. The result would, therefore, be far from his expectations of the outcome of a proper hedge. Obviously, what he should have done was to hedge the 1,000 bales of low middling with 900 bales of futures (1,000 less 10 per cent). Then the loss in futures would have equalled the gain on the spot purchase. Similarly, a sale of 2,500 good middling should be hedged by the purchase of 2,600 bales of futures (104 per cent of 2,500), if good middling is worth 4 per cent over middling cotton, i.e., 104 per cent of middling cotton.

To the degree of constancy that is maintained in the percentage value of each grade as compared with the basic grade of middling, to that same degree is a proper hedge obtainable (as shown above) against fluctuations in grade differences that are attributable to advances and declines in the price level. Stated in other words, the proposition simply means that the proper quantity to be hedged in a spot transaction is not the quantity bought or sold, but the basis middling equivalent of that quantity, e.g., 1,000 bales of low middling is really equivalent to only 900 bales of middling cotton and so should be hedged with 900 bales of futures. After all, there is nothing illogical in this.

Further thought along these lines reveals that instead of quoting grade differentials by hundredths of one cent per pound it would be more scientific to quote them as percentages of middling, as is done with certain cotton wastes. These percentages might change slightly when an oversupply or an overdemand arose, but in the main they would be relatively steady and to that extent be a better measure of relative grade values. The trade, however, is probably a long way from considering the suggestion of quoting grade differences by means of percentages and such a practice is by no means necessary for the adoption of the hedging technique described above.

More important however, is it to recognize, in carrying the thought further that the delivery on futures contract of 50,000 pounds (gross weight) of cotton irrespective of quality is not quite in accordance with what is disclosed above, and a strictly scientific contract is one wherein the delivery consists of 100 bales of even-running middling cotton or in the event other grades than middling are delivered, then the net dollar value of the delivery should equal (within one per cent.) the value of 100 bales of middling cotton. In other words, the proper basis of settlement should be the value of 50 000 pounds (gross weight).

ESTIMATES OF CONSUMPTION AND CARRY-OVER OF AMERICAN COTTON.

The New York Cotton Exchange Service estimate that the world's consumption of American cotton this season will be around 13,200,000 to 13,400,000 bales.

Mills in U.S.A. are now running at a very low rate and are slowly reducing operations. In Great Britain, consumption has recently been reduced to a very low level, far below this time last year. On the Continent, curtailment is slowly increasing. Japanese spinners recently agreed to curtail operations ten per cent further, effective July 15. A world consumption of American cotton of 13,200,000 to 13,400,000 bales would be the smallest since the 1924-25 season, when the world used only 13,311,000 bales. Last season, world consumption of American cotton totalled 15,169,000 bales, two seasons ago 15,500,000, three seasons ago 15,753,000, and four seasons ago 14,010,000.

If world consumption of American cotton this season should total 13,400,000 bales, the world carry-over of American at the end of this season, that is, on July 31, would be about 5,800,000 bales. If consumption should be 13,200,000, the world carry-over would be about 6,000,000. Either a carry-over of 5,800,000 or of 6,000,000 would be the largest, with the exception of that of 7,794,000 at the end of the big crop season of 1926-27, since that at the end of the 1920-21 season, when it totalled 9,674,000. On July 31 last year, the world carry-over of American totalled 4,474,000 bales, two years ago 5,121,000, three years ago 7,794,000, and four years ago 5,501,000.

If the world carry-over of American cotton should be 5,800,000 bales with a stock of American in this country at end of season around 4,250,000, as seems probable from our analyses of supply and distribution in this country, the stock of American cotton abroad on July 31 would be about 1,550,000. If the carry-over should be 6,000,000, the stock abroad would be about 1,750,000. On July 31 last year the stock of American cotton abroad totalled 2,343,000 bales, two years ago 2,696,000, three years ago 4,132,000, and four years ago 2,088,000. In other words, while the world

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carry over of American cotton promises to be much larger at the end of this season than in recent seasons, with the exception of 1926-27. The stock of American abroad will probably be much smaller than at the end of any recent season, even including 1926-27.

Crop News.

Messrs. I. B. Keech & Co., New York, have favoured us with a copy of a letter received from their traveller, Mr. J. W. Ray, dated Austin, Tex., June 30 last:—

"The weather has been exceedingly hot, with temperatures ranging from 100 to 108 degrees from two to five o'clock in the afternoon. The nights are cooler and the cotton revives by morning. Some of the cotton that did not have to be replanted is growing and showing a few blooms. I made a trip to look at the cotton near Austin, and I do not think it has been damaged by the extremely hot weather, but should weather continue hot and dry it will soon be suffering and deteriorating.

Letters received from Ganzales and Caldwell Counties, and from the Corpus Christi section, report really good crop conditions, with a few places near the timber or brush suffering from boll-weevil damage, also some leaf-worms are appearing. Farmers are using poison.

It is hard to say how long the crop can wait without damage from the very hot dry weather—in fact some fields are already suffering. Something like one-half of the crop is cotton from 10 to 20 inches high, growing slowly and forming squares and blooms. This cotton has very irregular stands, hardly half as many stalks on the ground as last year, however, when cotton has good space between plants it will put on many more bolls to the stalk than it will with stalks very close together; also the bolls will be larger, so it is my best judgment that it is better not to have stalks too close together.

With high temperatures and the very critical months of July and August the crop can do much better or be ruined by hot winds and high temperatures. Southern Texas has a fine condition now, and Central Texas is in fairly good condition. Just now it is in a condition to make a good crop or make a failure."

Messrs. Weil Brothers, Montgomery, Ala., in their semi-monthly crop letter of July 1, 1930, write as follows:—

"Weather conditions during the last ten days of June have been exceptionally favourable to the growing crop. From subnormal temperatures during the early part of June the thermometer jumped to abnormal temperatures, particularly in the Eastern cotton States, where as high as 106 and 108 degrees were recorded. Cotton being a sun plant and the fields being very clear of grass, the crop responded very quickly to this weather, showing a marked improvement. To some extent the lateness of the crop has been overcome—the plant appears to be very green and vigorous. Notwithstanding, we still have a very spotted condition. In the same fields one finds plants from six inches to knee high, the larger plants blooming and squaring and the small plants becoming well branched. It is, therefore, difficult to make a general estimate of the condition of the crop. Weevil activity has been greatly checked by the high temperatures. Rain is now needed, and at present writing good showers are falling over a large part of the belt.

The corn crop and food crops have been badly hurt by the recent heat wave. Some fields look parched and burned, and it is feared that the corn crop in the Cotton Belt will be a dismal failure. Rains, however, will materially improve this situation. We mention this because of the effect it might have on the farmer—he might be forced to buy food for his stock instead of producing it.

The spot situation is most peculiar. Very little cotton is being offered for sale from the country, and the Co-operatives for the present have withdrawn offerings. At the same time there is a considerable demand from Southern mills which—on account of lack of offering—is not easy to fill. A continuance of this situation might make it difficult for spinners to cover any sales of goods in actual cotton, becoming not a matter of basis but a matter of finding the cotton."

Messrs. Procter & Gamble, of Cincinnati, on July 2, issued the following cotton crop report:—

This report covers conditions surrounding the progress of the cotton crop for the period of June 5 to June 30, inclusive.

NORTH CAROLINA.

Weather.—Nights too cool at times for best progress during early part of period; rains over the entire state relieved all droughty sections. The past ten days were very favourable, with only occasional scattered showers and higher temperatures, particularly warmer nights.

Growth.—Cotton has made generally good advance. Stands are fair to good; chopping about completed. Squares appearing more generally in southern and south-eastern counties, with a few blooms reported.

Cultivation.—Generally good.

Season.—About five days to a week early in Piedmont, about normal on coast.

Boll-weevil.—Appearing in the southern and eastern counties. Few other insect complaints.

Condition.—Very good in the Piedmont; fair to good in eastern counties.

SOUTH CAROLINA.

Weather.—Similar to North Carolina; rains during middle of month very beneficial and higher temperatures during the past ten days particularly favourable.

Growth.—The weather was generally favourable to growth. Plants have healthy appearance. Blooms appearing quite generally. Stands are good.

Cultivation.—Good.

Season.—Continues early in the Piedmont, about normal on coastal plain.

Boll-weevil.—Appearing more generally; activity checked by recent high temperatures. Some poisoning has been done and farmers are prepared to poison extensively.

Condition.—Generally good.

GEORGIA.

Weather.— Except for some complaint of cool night temperatures in north during first half of period, the weather has been favourable to cotton over the entire state.

Growth. -Plants are generally of good colour and now showing good growth with higher temperatures over northern part of state. Excellent progress was made in south. Squares are showing in some northern counties; blooms are general over central and south. Bolls are forming in south.

Cultivation.— Generally good.

Season.— Crop is off to a good start; season is normal to a week early.

Boll-weevil.— Increasing reports of boll-weevil, but activity checked by high temperatures during past week or ten days.

Condition.— Has shown seasonal improvement during the month. Condition is good as a rule over the north, and good to very good in central and southern sections.

ALABAMA.

Weather. Except for some complaint of cool nights early in the period, the weather was favourable as a whole to cotton. Temperatures during the past ten days or two weeks were particularly favourable, being accompanied by occasional local showers.

Growth. While plants are still somewhat irregular as to size, stands are fair to good. Plant shows improvement as to appearance and development; early cotton is showing squares in the north. Blooms are general in the south; small bolls appearing on earlier cotton.

Cultivation.- Very good.

Season. -About normal.

Boll-weevil.- Appearing in scattered localities over central and southern parts of state.

Condition. Somewhat spotted, but mostly fair to good.

MISSISSIPPI.

Weather. Mostly fair and dry, with only occasional light scattered showers during period. Some complaint of cool nights over central and north during early part of period, but temperatures were above normal during past ten days. Seasonal rains with continued warm weather are desirable.

Growth. Late planted cotton made only fair to poor progress and is needing rain. Early planted cotton made fairly good progress. Stands are somewhat irregular in central counties; good elsewhere. Blooms showing on early planted cotton in central Mississippi, and now general in the south; earlier cotton in south is setting fruit.

Cultivation. Good.

Season.— Normal to a week early in the north; somewhat backward over balance of state.

Boll-weevil.- -Scattered reports over southern and some central counties; activity checked by high temperatures.

Condition.— Spottedly fair to poor in some central counties, but fair to good elsewhere over the state.

TENNESSEE.

Weather.—Complaints of cool nights during first half of June, but temperatures were above normal during last half. Weather dry, with only light scattered showers, and mostly favourable. Good general rain would now be beneficial.

Growth.—Plant is of good colour and has made fairly good progress during the period. Stands are fair to good.

Cultivation.—Fields are generally clean.

Season.-- About a week to ten days early.

Boll-weevil. - None.

Condition.- -Fair to good.

ARKANSAS.

Weather.—Dry for the most part, with only occasional showers. Complaints of cool nights early in the period, but hot dry weather within past ten days or two weeks very favourable. General rain now needed.

Growth.—Cotton has made very good progress, as a rule; stands and general appearance fair to good. Blooms reported in southern part of state.

Cultivation.—Now good.

Season.—Slightly late in south and west, but a week to ten days early in east and north.

Boll-weevil.—Very few reported to date.

Condition.—Good in eastern and north-eastern counties, fair to good elsewhere.

LOUISIANA.

Weather. Warm and dry; good general rain is now needed over entire state.

Growth.—While plant growth has been rather slow, cotton has taken on a sturdier appearance. Stands are fair to good. The plant is blooming quite generally.

Cultivation.—Fields are now clean and well cultivated.

Season.—Averages slightly late; some little replanted cotton in Red River Valley two to three weeks late.

Boll-weevil.—Recent hot, dry weather favourable for checking activity of weevil.

Condition.—Mostly fair to good.

OKLAHOMA.

Weather.—Complaints of cool nights early in the period and one heavy rain during the middle of the month. High temperatures, with occasional showers during the past two weeks were very favourable.

Growth.—Favourable weather during the past two weeks has promoted plant growth and good progress resulted. Plants are generally of good appearance. Stands are fair to good. Squares are showing on early plants, and scattered blooms reported.

Cultivation.—Up to a good standard.

Season.—Week to ten days late.

Boll-weevil.—Some few scattered reports in south-east.

Condition.—Fair in the east; good in west.

TEXAS.

Weather.—Night temperatures were slightly below normal early in period. Moderate showers to good rains up to June 15 were favourable over the entire state, except in the south, where not needed. Dry weather has prevailed during the past two weeks which, with the high temperatures, were favourable in most sections; late planted cotton, however, is now needing rain.

Growth.—Weather has been mostly favourable for cotton, which has shown improvement. Stands are fair to good. The plant is beginning to bloom in northern part of state. Blooms are general in central counties and cotton is now fruiting well in the south. The first bale was marketed on June 21, coming from Starr county.

Cultivation.—Made good progress during the month and fields are now generally clean.

Season.—Continues somewhat backward in most sections of state, averaging a week to ten days late.

Boll-weevil.—Some damage reported in the more southern counties; local complaints in central, south-east and eastern sections.

Condition.—Locally irregular, but is fair to good as a whole.

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SUMMARY.

Weather. Considering the belt as a whole, the weather during June was more favourable than otherwise to the cotton crop. Rains over the eastern coastal plains, as well as over western Oklahoma and Texas, were very beneficial; only light to moderate scattered showers were received elsewhere over the belt. Seasonal showers to moderate rains would now be beneficial, particularly over the central cotton states. Night temperatures were slightly below normal during the early part of the month. During the past ten days or two weeks temperatures have been above normal, ranging around 100° on several days. Warm, sunshiny weather, with occasional seasonal showers, would be most beneficial over the belt as a whole during July.

Growth.— Early planted cotton has made good progress and is of good size and colour; having a generally satisfactory taproot development. There is some small replanted cotton over the belt, principally in the central Mississippi Valley and portions of Oklahoma and Texas. This cotton is now in need of moisture. Squares and blooms are general over the entire southern half of the belt, and are appearing locally on the earlier cotton in the north. The plant is taking on fruit in the extreme south.

Cultivation. Fields are generally clean, the plant being in an unusally high state of cultivation over the entire belt.

Season. -Large portions of the belt now report about seasonal progress. The crop is slightly early in the eastern states as well as over the northern limits of the belt, but is late over the southern Mississippi Valley and in the west.

Boll-weevil. The weevil are in evidence over the southern half of the belt, but activity has been checked by recent high temperatures. Farmers have started poisoning as a control measure and are generally prepared to actively combat the weevil this year. A great deal, of course, depends upon the weather during July and August. There are .only a few other insect complaints.

Fertilizer. -Latest figures indicate the movement for this season, up to June 1, as 2.7 per cent. heavier than last year for the southern states. Only two of the more important eastern states show decreases, these being North Carolina and Alabama; these decreases amount to only about 4 per cent. for each of those two states.

Acreage.— Changes in acreage this year are generally unimportant. Our reports at present indicate decreases in the Carolinas and in Oklahoma and Texas, elsewhere the acreage is practically unchanged or shows a slight increase. Our reports indicate the net decrease as amounting to 2.3 per cent., or a planted acreage this year of approximately 46,000,000 acres.

Condition and Outlook.— Aside from some little late cotton, the crop as a whole has shown about the normal development during June. The condition at present is fair to good, with only a few exceptions and is about at the ten-year average. With practically all human factors favourable at present, the outlook can be said to be promising; the weather during July and August remains largely the determining factor as to yield.

Messrs. Munds & Winslow, New York, write under date July 3 as below:—

It is safe to say that with a propitious season a crop as large as any grown, with the exception of 1926-27, can be produced on the area seeded to cotton this year. The crop, of course, could fall below 14,000,000 bales, but with the start thus far this season it seems to us that it would require a super-calamity to bring about such a failure.

The crop has made much progress since the early part of June. Deficiency in temperatures has been made up, and, with a minimum rainfall following a period that afforded ample subsoil moisture in most districts, there has been a splendid opportunity for cultivation and clearing the fields of weeds and grass. Hot weather, of a degree almost unprecedented at this stage of the season, particularly east of the Mississippi, has operated to furnish exceptional weevil control, coming as it did at a time when the first brood of weevils was beginning to hatch. Occasional showers and seasonal temperatures should provide a promise that might become brilliant in the course of the next few weeks.

The best crops at this time, according to our advices, are in Georgia and Alabama. Unless the weevil does exceptional damage before the end of August, these two States should return yields that would go far toward offsetting possible declines in the central belt as compared with last year. Present indications point to yields in Oklahoma and Texas well above last season.

The Fossick Statistical Bureau, Memphis, writes under date July 4, 1930, as follows:—

"Weather conditions during the week were favourable for the cotton crop in Alabama, the Atlantics, Oklahoma and Texas, but too dry, especially for late cotton, in central districts of the belt. There perhaps was a little too much rainfall in portions of South Carolina and Georgia, causing boll-weevils to increase, but not yet alarmingly, poison is held in readiness and is being used where infestation seems to warrant.

The central belt has been too dry for more than a month, and is mostly without relief, but widely scattered showers, mostly light to moderate, some heavy, occurred early in the week and were beneficial where they occurred. There are dry spots in Texas, mostly central and north, and in western Oklahoma, with some complaints of hot winds and sandstorms.

Temperatures were above seasonal normal—favourable—most of the week and about normal as the week ended.

June was very dry over the central belt, but elsewhere moisture conditions were favourable except in spots. The central belt has had little rainfall since about May 18, to the detriment of late cotton, which is very small and at nearly a standstill, early cotton is making fair progress.

Early cotton is blooming over most of the belt and is squaring freely, with very little complaint so far of shedding. Fields are clean and well cultivated. The crop as a whole averages about one week late.

Night temperatures during the first half of June were unfavourably low throughout the belt, temperatures were favourable during the last half.

The crop prospect in the Atlantics is the best in several years. In Texas and Oklahoma it is about a 10-year average, much better than at this time last year, and seems to be in a fair way to make further improvement. Central belt prospects are not nearly so good as at this time last year and are considerably below a 10-year average for the date, although showing some slight improvement during the last two or three weeks. It would be almost unprecedented if relief is much longer delayed, and it is reasonably certain that good soaking rains would effect a great change."

CROP DAMAGE FROM VARIOUS CAUSES.

Year	Climatic Causes				Insects			
	Deficient Moisture	Excessive Moisture	Other Climatic	Plant Diseases	Boll Weevil	Others	Total Damage	Actual Yield lbs per acre
	% Reduction from full yield per acre							
1921	8.6	4.3	3.1	16.0	31.2	4.2	52.9	124.5
1922	10.3	4.9	2.3	0.8	23.3	3.4	45.2	141.5
1923	7.2	8.0	2.0	0.7	19.2	7.4	45.5	130.6
1924	14.0	5.0	2.3	0.8	8.1	3.9	34.7	157.6
1925	24.6	1.4	3.0	0.7	4.1	2.2	36.0	167.2
1926	5.3	3.2	2.9	2.1	7.1	8.9	29.5	182.6
1927	6.4	4.9	2.8	1.5	18.5	4.4	38.7	154.5
1928	4.4	7.3	4.9	1.9	14.1	3.4	36.0	152.9
1929	10.8	7.2	6.0	2.3	13.3	2.5	42.1	155.0

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Hon. Secretary: JOHN POGSON.

EGYPTIAN COTTON

EXTRACTS of the MINUTES of the MEETING of the SPINNER MEMBERS of the JOINT EGYPTIAN COTTON COMMITTEE, held at the Grand Hôtel et des Iles Borromées, Stresa, Italy, on May 4th, 1930.

Present: Messrs. W. H. Catterall (in the chair), F. Holroyd, Lt.-Col. N. Seddon Brown, William Howarth, W. Heaps, Frank Wright, George Berry (England); Roger Seyrig, Julien Le Blan (France); Dr. W. Bohm (Germany); S. A. Soldini, Achille Olcese (Italy); Otto Pick (Czecho-Slovakia); Arno S. Pearse, L. Assi, John Pogson and Norman S. Pearse (Secretaries).

Before commencing the ordinary business, Dr. G. Mylius (Italy) warmly welcomed the delegates to Stresa, and this was suitably acknowledged by the Chairman.

REFUSAL OF ALEXANDRIA GENERAL PRODUCE ASSOCIATION TO CONFORM TO THE BARCELONA RESOLUTION RE HUMIDITY IN EGYPTIAN COTTON.

The minutes of the meeting of the Egyptian Section held at Cairo, January 5, 1930, were then considered.

(These minutes have been previously circulated.)

A long discussion ensued, and finally it was decided that a Manifesto* be submitted to the Government of Egypt showing the development of the humidity problem in Egyptian cotton starting with the early investigation by the International Federation in 1910, the delays occasioned by the Alexandria cotton shippers, the tabulations undertaken since the war, and the attitude of Alexandria during the recent conferences.

The meeting unanimously expressed the opinion of the spinners of Egyptian cotton represented by this organization, that the establishment of a testing house at Alexandria for the purpose of assessing the amount of moisture in each shipment, would not be acceptable, as the sampling and testing of *all* the shipments would take too much time, involve serious delays in shipping, and cause inconvenience to existing commercial and financial practices.

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* See page 679.

It was recognized that the only feasible way in which tests can be made for the purpose of assessing the moisture is at the mills, or at the ports of arrival, as hitherto carried out.

The meeting was entirely opposed to granting reciprocity of allowance in cases of shipments with excess fibre. It was decided that as and when the case had been prepared a copy should be submitted to each member of the Committee for their information.

LANDING WEIGHTS.

With reference to the remarks of Dr. W. L. Balls at the Cairo meeting on the question of Alexandria weights, referred to in the foregoing minutes, Mr. Howarth and all the other members present stated that Dr. Balls was in error, and that only landing weights at the ports of arrival could be considered.

The meeting reaffirmed the adherence to all the resolutions adopted at Barcelona as regards the percentage of moisture content, method of ascertaining the same, and tolerance.

LAW PREVENTING THE MIXING OF COTTON VARIETIES.

Mr. Pearse reported that the Government of Egypt had decided to proceed with a law preventing the mixing of varieties. He said that it was their intention to mark the bagging of bales as they came from the ginnery with the name of the variety of cotton which they contained, and that the duty of the inspectors would be to examine the marking of the sacks in the pressing establishments, with a view to checking that no other cotton had been used. The bales, when pressed in Alexandria, were also to be marked with the name of the variety.

The intimation of this development was received with satisfaction, and regarded as being in accordance with the various recommendations which have been made from time to time by the International Federation.

FOREIGN MATTER.

The following letter from a firm of Egyptian cotton spinners was read:—

> " We are sending you under separate cover the small parcel of string and cord mentioned in the following copy of a letter received from one of our mills:—
>
> > ' We continue to find very serious quantities of " foreign matter " in the bales of cotton, and regret to say that we certainly cannot find that the slightest improvement has been made as a result of the complaints made for some time past.
> >
> > ' We enclose a small parcel of string and cord, which we find to be particularly troublesome. On account of its being rather lighter in colour than the ordinary hemp sacking, it is not so easily detached in mixing the bale, and it splits up very easily into millions of short fibres, each of which, if it gets as far as the mule, causes a fault in the yarn. If cotton string could be used in place of this a big improvement would be effected.' "

The Secretary was instructed to make again representations to all interested parties in Egypt. The following resolution was unanimously adopted:—

> "The spinner members of the Joint Egyptian Cotton Committee are of the opinion that in the stitching-up of bales, in place of hemp or jute string, only cotton string should be used."

The presence of even small particles of jute or hemp fibres in the cotton causes frequently the breakage of yarn in the spinning process; it is impossible for the operatives in the opening department to detect such impurities, of which very large quantities are contained in cotton shipments from Egypt. In spite of many previous complaints, there has been no improvement whatever in this regard.

HUMIDITY TESTS OF EGYPTIAN COTTON.

Consideration was given to the fourth tabulation prepared by the Head Office of moisture tests of Egyptian cotton which have been taken in various countries. This tabulation showed a higher percentage of moisture than in any previous compilation undertaken by the International Federation, the final results of the comparative tests being:—

	Per cent.
Submitted at Zurich, June, 1928	9·051
Submitted at Brussels, May, 1929	8·960
Submitted at Barcelona, September, 1929	8·486
The figure of the present compilation is	9·475

A copy of the new tabulation is appended.

DATE OF NEXT MEETING.

It was the unanimous desire of the spinner members of the Joint Egyptian Cotton Committee that the next meeting should be held in Egypt in February, 1931, and that attendance thereat should be strictly confined to members of the Joint Egyptian Cotton Committee.

A vote of thanks to the Chairman terminated the proceedings.

FRANCE.

The following table was presented at the meeting:—

CLASSEMENT DES VENDEURS AVEC INDICATION DES % D'HUMIDITE

Clef No.	Nombre d'essais	Nombre de bal. représentées	% d'Hum. s/poids sec. sup. à 9	% d'Hum. s/poids sec inf. à 9	Nombre d'essais donnant plus de 9	moins de 9
—	1	33	9,644	—	1	0
2	3	62	9,539	—	2	1
5	6	186	—	8,963	3	3
8	4	96	9,612	—	4	—
9	5	180	—	8,229	2	3
10	1	35	—	8,511	—	1
12	6	350	9,595	—	6	—
13	17	680	9,311	—	14	3
—	1	150	9,396	—	1	—
14	4	125	9,222	—	3	1
19	2	18	—	8,613	—	2
—	2	250	10,381	—	2	—
25	1	25	9,177	—	1	—
—	1	100	10,274	—	1	—
28	2	45	9,962	—	2	—
32	4	250	9,329	—	3	1
34	2	75	9,945	—	2	—
38	1	6	9,946	—	1	—
39	6	311	10,002	—	6	—
	69	2,977	9,455		54	15

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⁂

Cables : CONFIDENCE, Alexandria

Moisture Tests of Egyptian Cotton

4th Tabulation

REPORT by ARNO S. PEARSE, *General Secretary, International Cotton Federation, Manchester, prepared for the Meeting of the Joint Egyptian Cotton Committee, Stresa, May* 4, 1930.

This tabulation comprises 630 tests, representing in all 21,358 bales of both Upper and Delta cottons. The average percentage of moisture on the dry weight of these tests showed a moisture content of 9.475 per cent., which may be regarded as the average moisture content of the 1929-30 crop of Egyptian cotton on arrival at the spinning mills of Europe.

In order to ascertain the quantity of moisture paid for by the spinners at the price of Egyptian cotton we proceed as follows:—

9.475, less 8.900, as per resolution adopted at Barcelona = 0.575%.

994,000 bales were consumed by the world during the year ending January 31 last; therefore 0.575 per cent. on 994,000 bales = 5,715 bales of water, at £40 per bale = £228,600 represents the loss to the industry on the 9 per cent. basis. On the old standard of 8½ per cent. regain the loss would be equal to £387,640.

It should be remarked that the cotton tests comprised in this tabulation show a higher percentage of moisture than in any previous periodical test undertaken by the International Federation. Our previous tabulations showed the following results:—

	Per cent.
Submitted at Zurich, June, 1928	9·051
,, Brussels, May, 1929	8·960
,, Barcelona, September, 1929	8·486
Now the figure is	9·475

At the rate of 8½ per cent. regain there is only one firm, viz., Hirzel & Co., which has delivered any excess fibre, but this firm is represented only by four shipments. Hirzel & Co. have always been in the excess fibre list.

Summary of Returns from Czecho-Slovakia, England, France, Germany, Italy and Switzerland

Italy's returns are treated separately at the end. The returns from the other countries are summarised in the first two tables. This summary relates to returns received since the Barcelona Cotton Congress up to April 15, 1930.

Key No	No of tests	No of bales represented	% Regain on 8½% dry weight	† Excess fibre on 8½% regain	Number of Tests Excess moisture (over 9%)	Excess fibre (under 9%)
1	5	120	9·526		3	2
2	43	1,486	9·516		32	11
3	13	390	9·348		9	4
4	12	400	9·412		8	4
5	7	226		8·518	3	4
7	3	120	9·145		2	1
6	1	70	9·950		1	
8	4	96		8·996	1	3
9	44	1,930		8·873	21	23
10	15	375	9·218		10	5
11	3	85	-	8·989	1	2
12	100	3,557		8·738	29	71
13	30	897	9·040	—	17	13
14	10	495	9·200	--	6	4
15	10	301	9·494	-	8	2
16	9	270	9·523	-	6	3
17	4	120	9·992	--	4	—
18	1	30	9·950	--	1	—
19	44	1,488	9·056	- -	21	23
20	24	667	9·009	-	11	13
21	20	600	9·220		12	8
22	23	725	9·731		19	4
23	1	120		8·038		4
24	23	756	9·068		11	12
25	17	690	9·098		11	6
26	1	30	9·840		1	
27	32	1,102	9·221		20	12
28	9	410		8·687	3	6
29	14	355	9·103	-	9	5
30	42	1,165		8·578	9	33
31	2	60	9·010	-	1	1
32	30	690		8·582	5	25
33	1	30	- -	8·500	--	1
34	2	60	9·520	—	2	- -
35	4	170	9·510	- -	3	1
36	16	605	9·229	—	10	6
37	6	180	9·530	—	5	1
38	4	96	9·230	- -	4	—
39	4	91	9·320	—	4	—
	636	21,358	9·475*		323	313

* True average

† Allowing 0·5% tolerance (latitude).

ANALYSIS PER SHIPPER

List in "Order of Merit"

The following five firms show *excess of fibre*, over 9 per cent. dry weight, with tolerance of 0·5 per cent. over 8½ per cent. regain:—

Key No	No of tests	No of bales represented by tests	Excess fibre moisture below 9 per cent	No of tests showing excess moisture	excess fibre
30	42	1,465	8·578	9	33
32	30	690	8·582	5	25
28	9	410	8·687	3	6
12	100	3,557	8·738	29	71
9	44	1,930	8·873	21	23

All the others show *excess moisture*, viz.:—

			Excess moisture over 9 per cent.		
20	24	667	9·009	11	13
13	30	897	9·040	17	13
19	44	1,488	9·056	23	47
24	23	756	9·068	11	12
25	17	690	9·098	11	6
29	14	355	9·103	9	5
14	10	495	9·200	6	4
10	15	375	9·218	10	5
21	20	600	9·220	12	8
27	32	1,102	9·221	20	12
36	16	605	9·229	10	16
3	13	390	9·348	9	4
4	12	400	9·412	8	4
15	10	301	9·494	8	2
2	43	1,486	9·516	32	11
16	9	270	9·523	6	3
22	23	725	9·731	19	4

Only those firms are included from which we have received eight returns at least.

ITALY

The ITALIAN result reached us after the previous tabulation had been completed. It is strange that the average result of the Italian spinners should show a lesser degree of moisture than for any other country, viz., 8.48 per cent., against 9.475 per cent.

The Italian tests were undertaken by the Assoc Ital. Facista degli Industriali Cotonieri, Milan, and are as follows:—

ARRIVALS FROM 1st OCTOBER TO 31st MARCH, 1930

Key No	No of bales	No of tests	% Regain on 8½% dry weight
1	320	15	8·10
2	200	10	8·14
3	150	5	8·17
4	250	14	8·34
5	850	36	8·39
6	400	24	8·45
7	1,625	72	8·49
8	375	22	8·50
9	150	7	8·51
10	200	12	8·52
11	300	14	8·57
12	300	11	8·68
13	120	5	8·90
14	325	23	8·96
15	60	4	8·92
Total	5,625	277	—
General average			8·48

SWITZERLAND

Report on the Humidity Contents of Egyptian Cotton imported into Switzerland

Third Report, in accordance with letter from the Head Office of the International Cotton Federation, dated 9th April, 1930.

The returns of the 31 cotton mills relate to the conditioning results obtained at the St. Gall Institute, and refer to the period from May 1, 1929, to April 1, 1930.

(*a*) *Sampling and manner of making the test* were undertaken exactly in the same way as in the previous year. No change whatever was made.

(*b*) *Checking of results of the spinning mills.* No further checks were considered necessary of the individual mills. So far, 12 mills have not yet returned. They are mostly small ones.

(*c*) *Classification of varieties.* The results were classified separately, according to each variety. The corresponding number of bales in the respective shipments has been added.

Varieties.	Number of bales.	Number of conditioned bales.
Uppers (Maco)	5,255	576
Delta-Sakellaridis	2,831	435
Pillion	390	61
Maarad	90	15
Nahda	30	4
Zagora	15	3
Algeria	46	5
Congo	30	3

(*d*) *Calculation of the mean of the degree of humidity.*

$$\text{Total average of the humidity contents} = \frac{\text{Sum of (humidity per cent. rate} \times \text{number of conditional bales}}{\text{Total of conditioned bales.}}$$

SWITZERLAND

Average per cent of Humidity Contents of Egyptian Cotton imported into Switzerland on the basis of Dry Weight

Compiled by the Swiss Institute of St. Gall, according to returns received from May 1, 1929, to April, 1930. (*Nos.* 25–31)

	Return No.	25	26	27	28	29	30	31	Total average
Uppers (Maco)	Humidity per cent.	9·24	8·91	9·08	9·00	9·15	9·70	9·55	9·21%
	Number of bales of all shipments	495	482	495	1,320	1,323	420	720	5,255
Delta-Sakellaridis	Humidity per cent.	9·15	8·82	8·44	9·00	9·10	8·76	9·42	8·85%
	Number of bales of all shipments	45	186	345	225	485	1,409	136	2 831
Pillion	Humidity per cent.	—	—	7·93	10·17	9·39	8·89	8·80	9·13%
	Number of bales of all shipments	—	—	30	31	107	192	30	390
Maarad	Humidity per cent.	—	8·39	—	—	—	7·74	—	7·87%
	Number of bales of all shipments	—	30	—	—	—	60	—	90
Nahda	Humidity per cent.	—	—	—	—	8·92	—	—	8·92%
	Number of bales of all shipments	—	—	—	—	30	—	—	30
Zagora	Humidity per cent.	8·81	—	—	—	—	—	—	8·81%
	Number of bales of all shipments	15	—	—	—	—	—	—	15
Algeria	Humidity per cent.	—	—	—	—	7·89	—	—	7·89%
	Number of bales of all shipments	—	—	—	—	46	—	—	46
Congo	Humidity per cent.	—	—	—	—	10·63	—	—	10·63%
	Number of bales of all shipments	—	—	—	—	30	—	—	30

(ORIGINAL TEXT)

Feuchtigkeit in ägyptischer Baumwolle.

Bericht uber den Feuchtigkeitsgehalt der in die Schweiz eingefuhrten aegyptischen Baumwolle

III. SEPARATBERICHT

Mitteilung an the International Federation of Master Cotton Spinners and Manufacturers' Association, gemass Schreiben von Mr. A. S. Pearse, vom 9. April 1930.

Die in den Meldescheinen No. 25-31 von der Schweiz. Versuchsantalt in St. Gallen gesammelten Ergebnisse der 31 beteiligten Spinnereien uber die Konditionierung von Rohbaumwolle erstrecken sich uber den Zeitraum vom 1. Mai 1929 bis 1. April 1930.

(a) PROBENAHME DER MUSTER AUS DEN BALLEN UND AUSFUHRUNG DER KONDITIONIERUNG erfolgen gleich wie im letzten Berichtsjahre. Abänderungen oder Zusätze wurden keine gemacht.

(b) KONTROLLE DER RESULTATE DER SPINNEREIEN. Die Kontrolle wurde in diesem Berichtsjahre in den einzelnen Spinnereien nicht weiter durchgeführt. Bei 12 Firmen steht sie noch aus, es sind darunter meistens kleine Spinnereien.

(c) SORTENEINTEILUNG. Die Ergebnisse wurden separat fur alle Lieferungen nach den Sorten geordnet in den Meldescheinen No. 25-21 aufgeführt. Zu jedem Mittelwert wurde die zugehörige Ballenzahl der betreffenden Parien beigefügt: —

Sorten.	Ballenzahl.	Anzahl der kondit. Ballen.
Uppers (Maco)	5,255	576
Delta-Sakellaridis	2,831	435
Pillion	390	61
Maarad	90	15
Nahda	30	4
Zagora	15	3
Algerische	46	5
Kongo	30	3

(d) BERECHNUNGSART DES MITTELS DES FEUCHTIGKEITSGEHALTES.

$$\text{Gesamtdurchschnitt im Feuchtigkeitsgehaltes} = \frac{\text{Summe von (Feuchtigkeits \% Satz} \times \text{Zahl der kondit. Ballen}}{\text{Total der konditionierten Ballen.}}$$

Durchschnittlicher, prozentualer Feuchtigkeitsgehalt aegypt. Baumwollen, bezogen auf das Trockengewicht

---

Zusammenstellung nach Meldescheinen No. 25–31 *vom* 1. *Mai* 1929 – 1. *April* 1930

	Meldeschein No.	25	26	27	28	29	30	31	Gesamt-durch-schnitt
Uppers (Mako)	F %	9·24	8·91	9·08	9·00	9·15	9·70	9·55	9·21%
	Ballenzahl aller Partien	495	482	495	1,320	1,323	420	720	5,255
Delta-Sakellaridis	F %	9·15	8·82	8·44	9·00	9·10	8·76	9·42	8·85%
	Ballenzahl aller Partien	45	186	345	225	485	1,409	136	2,831
Pillion	F%	—	—	7·93	10·17	9·89	8·89	8·50	9·13%
	Ballenzahl aller Partien	—	—	30	31	107	192	30	390
Maarad	F %	—	8·30	—	—	—	7·74	—	7·87%
	Ballenzahl aller Partien	—	30	—	—	—	60	—	90
Nahda	F %	—	—	—	—	8·92	—	—	8·92%
	Ballenzahl der Partie	—	—	—	—	30	—	—	30
Zagora	F %	8·81	—	—	—	—	—	—	8·81%
	Ballenzahl der Partie	15	—	—	—	—	—	—	15
Algerische	F %	—	—	—	—	7·89	—	—	7·89%
	Ballenzahl der Partie	—	—	—	—	46	—	—	46
Kongo	F %	—	—	—	—	10·63	—	—	10·63%
	Ballenzahl der Partie	—	—	—	—	30	—	—	30

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Manifesto on Humidity in Egyptian Cotton to the Egyptian Government

from the Spinners' Section of the Joint Egyptian Cotton Committee

IN accordance with the resolution adopted at the meeting of the spinners' section of the Joint Egyptian Cotton Committee, which was held at Stresa on May 4, 1930, we have prepared the following statement setting forth the spinners' case in this question from the first steps which were taken by the International Cotton Federation to the present day.

The fact that Egyptian cotton is the only cotton in the world which is artificially and systematically damped (Chinese and Indian cottons are clandestinely damped, but not in a systematic manner) caused the International Cotton Federation as far back as 1911, when the Secretary paid a visit to Egypt, to raise objections to this system (p. 163 Egyptian Cotton Congress Report 1912, English edition), and in the following year the subject was exhaustively discussed at Alexandria (pp. 18 to 24 Egyptian Cotton Congress Report 1912).

Dr. Ruffer, Vice-President of the Alexandria Municipality and a prominent member of the Egyptian Government Cotton Commission of 1910, suggested then that Alexandria, which was not only the greatest trading station in the East of olden times, but also the greatest scientific town of the East, should establish in Alexandria an institute specially devoted to the study of useful plants, and particularly cotton, and he expressed the hope that by the time when the spinners should come again to Alexandria, at a not far distant date, such an institution should be in existence. That was in 1912. The Chairman, Mr. P. Fenderl, undertook at that meeting that the whole question should be studied by the Alexandria General Produce Association.

The spinners made a number of tests which were published in the Cotton Congress Report of Scheveningen, but no tests whatever were published by the Alexandria General Produce Association, nor is there any reference that such tests were ever made in Alexandria until 1927; therefore 15 years of delays without any action on the part of Alexandria shippers.

The war intervened, during which time the activities of the International Cotton Federation were almost entirely suspended, but shortly after the termination of the war spinners' complaints of excessive moisture became very frequent, and the Swiss Spinners' Association prepared for the meeting at Alexandria, held in February, 1927, a tabulation and a manifesto showing that the Swiss spinners had paid on their imports

During the season	Swiss francs
1924 25	870,000 (£34,000)
1925 26	507 000 (£20 280)

for the excessive water contained in shipments from Egypt (International Cotton Congress Egypt, 1927, p 149)

Every country using Egyptian cotton protested against this excessive damp and the Alexandria General Produce Association asked the spinners to produce figures We have produced figures, and the results of these are shown at the end of this statement

The Alexandria shippers requested the spinners as a remedy not to buy from any firm except those who had made honest shipments, but our tabulations show that in that case our transactions would be limited to two or three firms, and the spinners maintain that if such argument is to apply in the case of dampness, it should equally be used in the case of other disputes, and it would follow that arbitration boards would become useless

The spinners have repeatedly asked the Alexandria General Produce Association to abolish the by-law which they have established preventing their members from guaranteeing any moisture degree in the sale of cotton

Such action is diametrically opposed to their own, when buying cotton the exporters are in the habit of making considerable deductions, if any cotton is considered by them as being damp

At the International Cotton Congress in Alexandria the following resolution was unanimously adopted —

> "The delegates of the International Cotton Federation respectfully urge upon the cotton merchants of Alexandria, who are parties to the agreement prohibiting them under penalty of a fine to sell cotton with a maximum degree of moisture, to abolish this agreement
>
> "It is further resolved that, with a view to arriving finally at the natural amount of moisture in Egyptian cotton, the cotton merchants of Alexandria and the cotton spinners in their respective countries should undertake researches, in order that at the next International Cotton Congress in Barcelona, 1929, a report be presented"

The Alexandria shippers agreed to make regular tests, and the spinners recommended to their members at the meeting held in Manchester on June 7, 1927, to have at least 2 per cent of all the shipments they receive tested Sixteen months after Alexandria had promised to make tests the Chairman of the Alexandria General Produce Association, Mr Choremi, gave as one of the reasons why these tests had not been made (Minutes of the Zurich meeting, June 15, 1928) that "several conditioning stoves which the Egyptian exporters had installed were burnt." At that meeting the spinners again asked the Alexandria General Produce Association to rescind the rule preventing their members from selling cotton with a fixed standard of moisture, and, with a view to meeting Alexandria's argument the spinners at that conference brought forward the following resolution:

> "That a maximum degree of moisture up to 9 per cent regain be admitted, but where this limit is reached by any lot the spinner may be entitled to claim from the shipper any excess over 8½ per cent regain."

The fact that a number of the conditioning stoves of the Alexandria shippers were burnt shows the inadequate equipment or the incapability of the staff to undertake tests. The figures of test produced later by Alexandria can therefore not be regarded as being as reliable as those of the official testing houses in Europe.

It was only on May 25, 1929, that the Alexandria General Produce Association, after a delay of 17 years submitted the first results of their tests. At that meeting the representatives of the Alexandria General Produce Association took up the point that they could not accept the results of any tests except those which were made at an official testing house to be established in Alexandria, and that Alexandria shipping weights should be recognized if the Alexandria shippers were to agree to any fixed standard of moisture. The Alexandria delegates pointed out that they had no power to discuss the question further than was stated in the official circular of the Association, and that the final decisions would have to be reached at the Barcelona Cotton Congress.

Mr William Howarth, who was the Chairman of the meeting, expressed the hope that on that occasion the officially appointed delegates of the Alexandria General Produce Association would be authorized to fix a standard of moisture jointly with the cotton spinners, but later events proved that they had not obtained that authority from their members.

At Barcelona, in preparation of the International Cotton Congress meetings, two lengthy conferences took place on September 16 and 17, 1929, at which, after very strenuous deliberations, the duly appointed delegates of the Alexandria General Produce Association had agreed with the spinners to recommend to their members the acceptance of the following resolution, and they pledged themselves to do everything in their power to achieve this result:—

> "Whilst the spinning members of the Joint Egyptian Cotton Committee are firmly convinced that 8½ per cent is an adequate allowance for moisture content in Egyptian cotton, they are prepared to enter into an agreement with the

Alexandria General Produce Association that, for a period of 12 months, commencing December 1, 1929, and, as temporary measures only, they will not claim for excess moisture, unless 9 per cent regain is exceeded, in which case the rebate will be retrospective and start from 8 9 per cent

“ The spinners’ representatives of the Joint Egyptian Cotton Committee unanimously recommend to the affiliated spinners that, whenever a test for humidity is made on their behalf, they should, if requested, communicate the result to the respective cotton shippers in Alexandria ”

The duly appointed delegates of the Alexandria General Produce Association were The President, Mr C J Choremi, His Excellency Yehia Pacha, Messrs G Allemann, H B Carver and H Lindemann (Messrs K P Birley, G Pilavachi and H E Finney were appointed, but did not attend) Every one of the spinner delegates of the Barcelona Congress was convinced that the standard of moisture and the whole unpleasant discussions on the humidity had been amicably settled at the Barcelona Congress, after many years, but to the spinners’ great astonishment the Alexandria General Produce Association informed them by letter of the 21st November, 1929, i e , two months after the Barcelona meeting, that they declined to accept the proposal submitted by the Barcelona Congress

Instead of complying with the request of the spinners, the Alexandria General Produce Association had again insisted upon the signature of the special resolution prohibiting members from guaranteeing the amount of moisture, inflicting a fine of £500 and in threatening with expulsion from the organization, in case of contravention

At the meeting held in Cairo on February 6, 1930, it was shown that the Alexandria General Produce Association had reverted to its original demand, viz —

Establishment of a testing house in Alexandria, whose results should be considered final

Recognition of shipping weights at Alexandria

Reciprocity in case of excess fibre, i e , when the moisture regain is less than 9 per cent , allowance to the shipper to be made

Abolition of the penalty of 0 1 per cent , i e , that allowances are to be calculated from 9 per cent and not from 8 9 per cent

These demands are exactly the same as those which were brought before the Brussels Committee meeting in May, 1929

The spinners at Stresa have carefully considered the whole issue and regret that they are unable to make any further concessions beyond those granted at the Barcelona Cotton Congress

The spinning industry is forced, by a recognized trade usage, to deliver yarn with a standard of moisture of not more than 8½ per cent. It is only just and fair that the spinner should insist that the raw material is delivered to him with a fixed rate of moisture.

A standard of moisture prevents unfair dealings amongst the shippers in Alexandria and ensures that the buyer receives a straightforward deal.

The establishing of a testing house in Alexandria with the intention of testing 10 per cent. of all the shipments that are being made is an entirely impracticable proposition, as in consequence of the necessity of opening 10 per cent. of the steam-pressed bales of all shipments, delays would occur which would upset the entire method of handling shipments.

The only feasible way in which tests can be undertaken is through official testing houses at the ports of arrival, as carried out heretofore. These testing houses are working on a uniform basis and their results are recognized by any courts of law, consequently they ought to satisfy the Alexandria General Produce Association.

Landing weights are a recognized trade usage, and the spinner pays the exporter a price for the cotton which includes any risks which he may run in the transit of the cotton.

The tests which have been undertaken show distinctly that during the last year the moisture contents have increased, due largely, it must be surmised, to the protection which each shipper believes to have through the special undertaking which the Alexandria General Produce Association has enforced amongst its members, that none of them is allowed to sell with a fixed percentage of moisture.

The spinners' associations comprised in the Joint Egyptian Cotton Committee submit this summary of events to the Egyptian Government, as they feel sure that it will recognize the persistent policy of delays and postponements, practised by the Alexandria General Produce Association throughout the protracted negotiations that have taken place.

With a view to overcoming the main difficulty which the spinners experience we respectfully ask the Egyptian Government to take the necessary steps to render illegal the special resolution which the Alexandria General Produce Association has adopted, preventing any of their members to sell Egyptian cotton with a guarantee of a fixed standard of moisture. This resolution acts as a restraint of trade and is inimical to the best interests of Egypt's national trade, as well as to the cotton spinning industry.

(Signed) W. H. CATTERALL

May 30, 1930 *Chairman*

RESULTS OF THE TESTS OF EGYPTIAN COTTON SHIPMENTS CARRIED OUT BY EUROPEAN TESTING HOUSES.

Submitted at	Representing bales	Per cent.
Zurich, June, 1928	29,657	9·051
Brussels, May, 1929	20,300	8·960
Barcelona, Sept., 1929	9,000	8·486
Stresa, May, 1930...	21,358	9·475

994,000 bales were consumed by the world during the year ending January 31 last; therefore 0.575 per cent. on 994,000 bales = 5,715 bales of water, at £40 per bale = £228,600 represents the loss to the industry on the 9 per cent. basis. On the old standard of 8½ per cent. regain the loss would be equal to £387,640.

The results of 2,844 tests, representing 219,159 bales, taken by the Alexandria General Produce Association during 1929, and submitted to the Barcelona Cotton Congress, were as follows:—

	Per cent.
Sakel	9·03
Ashmouni	8·85
Zagora (Lower Egypt)	8·98
Pilion	9·24

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The Financial Policy of Intervention.

La Revue d'Egypt, in its issue of June 29, 1930, summarizes the opinions of various authorities on this delicate problem, as originally given in the Arabic "Ahram."

ISMAIL PACHA SIDKY, before he was called to be the President of the Council of Ministers, declared himself in the following terms:—

In principle I consider that the Government should sell all the cotton for which there is a demand up to the next crop. If it preserves the stock up to the next year, it will see that conditions have arisen which will prevent it from selling, as the full stock, plus the new crop, would be too big a weight on the market. We do not monopolize the cultivation of cotton. Our production does not represent more than a 20th part of the world's production, and our market is necessarily under the influence of foreign markets. The general tendency is for a fall in prices. It is useless to be frightened by this state of affairs. The time has come to rid ourselves of the slavedom of cotton. The Egyptians must occupy themselves with other resources—agricultural and industrial.

I am against the reduction of the cotton acreage. For an agricultural country, the aim should be to distribute its crops. It is astonishing that at a time when we are working to heighten the dam at Assuan and are occupying ourselves with great schemes of irrigation and drainage, we should think of limiting the cultivation of cotton. On the contrary, we should intensify this cultivation and introduce improvements and select good seeds, in order that each feddan should give a higher yield and a better quality, and in this way we should make up for the low price by the higher quantity and quality. The question of reduction of acreage should not need the attention of the Government; that is a question for the cultivator, who should study his own interest in the matter. If he finds that it is profitable to reduce the cotton acreage, he will do so himself. I think the Government ought to increase the import duties on corn and flour, because in that case the fellah will see that it is in his interests to increase the cultivation of foodstuffs. It will be objected that an increase of these import duties will cause an increase in the cost of living, but I think that the increase will not be very serious. The proof is that in spite of the fall of prices of corn and flour, the bakers have not reduced the price of the bread. Admitting even that the price of corn and flour will increase, this will only be felt in the towns, as the land workers eat bread made of maize, and the town dwellers have not suffered so much from the crises as the fellaheen.

ABDEL AZIZ BEY RADOUAN. This senator, who has made a special study of the cotton problems, approves the Government intervention, provided that it is limited. He says that the prices fixed by the Government during the months of November, December, January and February, were in harmony with those of American cotton, but not so from the beginning of March, when the Government maintained and even increased its purchase price, whilst American cotton fell from $18 to $13 approximately. In order to get rid of the cotton, the Government should accept up to September 30 all offers of purchase, even if they are lower than their price, on the condition that the purchaser undertakes to ship at once the cotton out of Egypt. Then, from October 1, 1930, to April 30, 1931, the Government should put up for sale daily in Minet el Bassal 300 bales, which should also be shipped out of the country at once. Such quantities will not influence the market, because at this period six to ten thousand bales of cotton are sold daily in Minet el Bassal. In this way in four years the Government will get rid of its stock.

Radouan Pacha is against the reduction of acreage, and is of the opinion that one should make use of the increase in arable land in order to intensify cotton growing, and to sell at prices in harmony with the normal conditions of the market. If the consumption of Egyptian cotton has never exceeded eight million cantars per year, it is solely on account of its high price. If one had cultivated varieties which were in harmony with the requirements of the industry, one could have sold even 20 million cantars.

Finally, Radouan Pacha declares himself in favour of increased duties for corn and flour.

FATALLAH PACHA BARAKAT, the former Minister of Agriculture, is of opinion that the offers should be proportionate to the demand. He is in favour of the restriction of the acreage, and is also an advocate of an increase in the import duties on corn. He considers that the Sudan cotton is not equal to the Egyptian cotton, and that it has not been a serious competitor.

PRINCE TOUSSOUN, in a letter addressed to William Bey Makraim Ebeid, when he was still Minister of Finance, states that he is not in favour of the restriction of acreage, as the price of cotton depends on the price of American. His Highness foresees that the price of cotton is still going to fall, and that the cultivator can only be recouped by a larger crop.

The *Revue d'Egypte* states that this enquiry shows clearly that though opinions are divided as regards the restriction of acreage they agree as regards the line to be followed for the sale of the Government stock.

On the question of corn and flour duties, aimed at to reduce indirectly the cotton acreage, everybody seems in agreement, except the consumer.

GOVERNMENT COTTON PURCHASES.

The Egyptian Government issued the following communiqué on June 25 last:—

"In compliance with the decision of the Council of Ministers, dated November 3, 1929, to the effect that the cotton taken up by the Government would not continue to be stored, and that the Government would try to realize it at the proper time in accordance with the needs of industry, the Ministry of Finance announces that it is disposed to sell what the industry may need of the cotton

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delivered to the Government since it entered the Bourse de Marchandises in November last. Sales will be made at the best possible price, but not below the present price, viz.: $28 for Sakellaridis fully good fair, and $19.80 dollars for Ashmouni fully good fair, from to-day until the beginning of the new cotton season, when the Government will cease selling during the whole of the season. The Government reserves to itself the right to raise the minimum price in the future, if circumstances require this increase. Applications for purchases should be addressed to the National Bank of Egypt in Alexandria, and the cotton bought must be exported before the advent of the new cotton season, as the object of the sale is to meet the needs of the industry when it requires the qualities of cotton possessed by the Government."

Government purchases up to July are as follows:

	Sakellaridis Cantars	Ashmouni Cantars
November, 1929	9,250	
December, ,,		235,000
January, 1930	101,000	-
February, ,,		96,000
March, ,,	643,250	
April, ,,		479,500
May, ,,	440,000	
June, ,,		794,500
	1,193,500	1,605,000
Purchases of July, 1930	82,750	

RUSSIANS REPORTED TO BUY 100,000 BALES EGYPTIAN COTTON.

The *Textile Zeitung* learns from its Cairo correspondent that The Soviet Government is on the point of concluding a contract for 100,000 bales, 20,000 bales of which are to be paid for in cash. A European bank is to guarantee the account for the remainder.

MARKET LETTERS.

The Cotton Export Company "Missr," Alexandria, in their June report, in speaking of the Egyptian Government intervention, states, in reply to unfavourable statements published by the "bears," that the financial position of Egypt is to-day stronger than that of any of the Great Powers of the world. Egypt possesses 14,000,000 inhabitants, with a national debt of £91,000,000; her liquid reserves are £40,000,000 (of which £12,000,000 are at the present time invested in cotton); she owns the State Railways free of any debt and they are worth £33,000,000; and one million feddans of land, represented by the State Domains, also free from any debt. Egypt has very well managed to balance its budget and to make a surplus, without having recourse to income tax. Egypt is therefore in a position to regard calmly the final result of her intervention in the cotton market.

The conclusions at which the "Missr" Company arrives are as follows:—

Our market is very bearish in sympathy with the American cotton market and in both seem to act as if here as well as there very big crops were an absolute certainty. That is not in accordance with actual facts, and as the fall has not been brought about by sales of producers or merchants but mainly by sales of speculators, a sudden turn may take place if for one reason or another speculation begins to cover its commitments.

The cotton received by the Government will not weigh heavily on the market during next season, as the Government is sure to take all the necessary precautions.

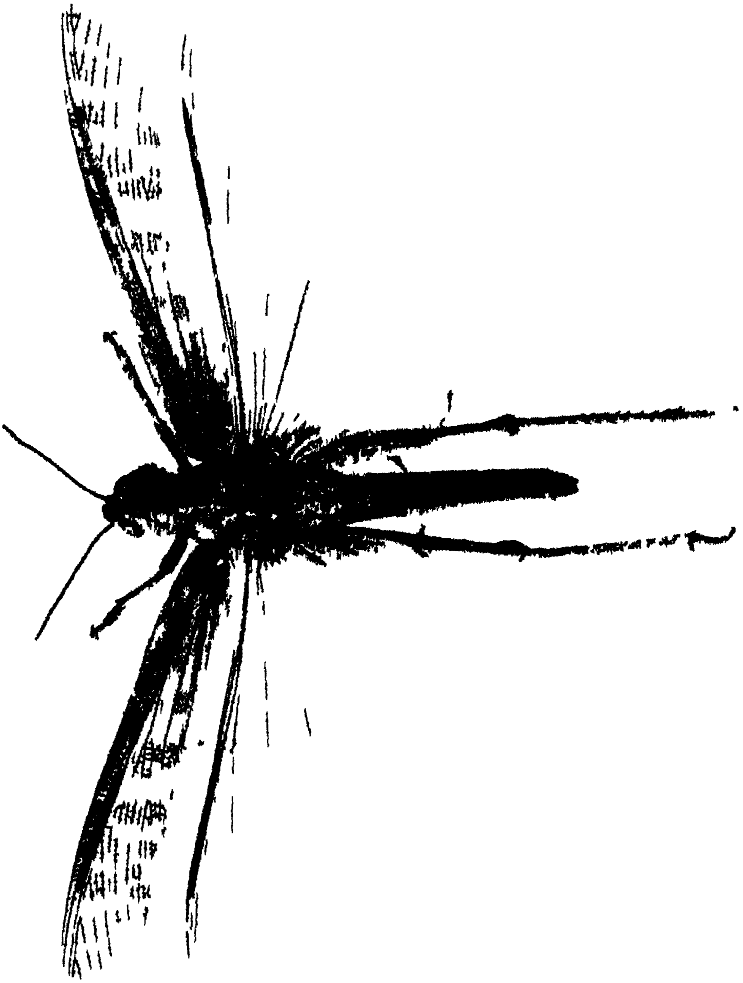
A reduction in acreage for Sakel is pretty certain to be effected, but not for the other varieties which are likely to be left without restriction.

Except for a temporary depression in December 1926, we have to go back more than nine years, February 1921, to find our cottons at so low a level of prices as they are at present. It was as recently as July, 1928, that Sakel and Ashmouni were worth almost double of what they are to-day. Whatever happens, we may therefore regard to-day's prices as cheap.

In all markets the results are always felt before the causes are realized, i.e., when a rise or a fall takes place, one does not recognize except later on the causes which have been responsible for these events, such as reduction or increase of production or consumption, injuries to crops, etc. But we are only too often inclined to discount such events a second time and to construct on their basis a new rise or fall, whilst they were responsible only for the first upward or downward movement. That is exactly what is happening to-day. One is bearish because one sees the big balance of the old crop and the probability of a large crop for 1930/31, but one forgets that these two bearish factors have already for some time exercised their influence and that if they did not exist we would never have reached the low prices of the present time. It remains to be seen whether the present prices have fully discounted the whole situation, but we must admit that such low prices which our market has known only twice in a period of ten years ought to include in anticipation many of the adverse elements.

Messrs. G. D. Economou & Co., Alexandria, write as follows in their weekly report dated July 3:—

" In the beginning of the week, now under review, our market showed the same firm tendency as that of the previous week. Rumours were spread to the effect that the Soviets were negotiating to purchase a large share of Government cotton, and this, coupled with the firm tendency in the leading markets abroad, enabled our market to register a gain of 50 points. This advance, however, was not of long duration owing to a number of sales made by the trade and the desire on the part of the speculation to sell



out for profit taking. Closing prices to-day are therefore almost the same as those of last week.

In our opinion, it is altogether out of the question to look to a sustained rise at present, as it is but natural, after the recent advance of about $2 over the lowest levels reached so far, that our market should partly react. We believe, however, that this would be to its advantage, as it would improve the technical position of the market and thereby render it more apt to profit of all favourable circumstances.

The rise, if it does materialize, will be in stages, as it would be asking too much for a stagnation and pessimism of such long duration to disappear all at once. We maintain, therefore, the opinion that we have expressed in previous reports, that during the next two months a "bullish" position is more likely to yield the best results.

Spot. A better demand has prevailed this week in the spot market. Spinners, having exhausted their stocks, were obliged to look to our market for supplies and to pay the prices imposed by the Government, there being no cotton available in the open market. The Continent were the principal buyers. Our impression is that between now and the end of the season some 20,000 to 30,000 bales of Government cotton will be sold.

There has also been a demand for new crop cotton for both Uppers and Sakels for shipment during September and October respectively. However, in view of the scarcity of old crop supplies, the bulk of the cotton being in the hands of the Government, the exporting houses were not very keen to accept such offers for fear that a shortage of supplies would prevent them from fulfilling their contracts.

Weekly sales have amounted to approximately 2,500 bales (against 5,800 last year), which figure comprises 600 Sakellaridis and 1,900 Uppers and others."

Messrs. P. Augustino & Co., Alexandria, in their market letter of July 3, write as follows:—

COTTON FUTURES

At the beginning of the week under review the market ruled firm, prices showing some good gains both for Novembers and Octobers. This upward movement cannot be ascribed to purchases by the trade, which have continued to be as moderate as they have been all this last time, but it seems to have been chiefly due to the combined Bull action of some professionals and speculators who worked for a reaction but without much conviction; this has been made evident from their haste to liquidate in order to secure profits as soon as prices for November and October exceeded $23.50 and $15.90 respectively.

This abortive Bull movement encouraged Bears to become again very aggressive, increasing with much confidence their short commitments, thus counteracting the effect of the trade purchases, which, although very moderate taken for a single day or for a week, must all the same amount to a big total.

Egyptians in Liverpool have not responded but very partially to our advance, and has encouraged some straddles resulting in the sale here of both Sakel and Uppers, which have been in evidence the last few days.

For the time being the feeling in our market continues to be very pessimistic.

In the first tender of July notices for 81,000 cantars have been issued, all of them passing into the hands of the Government, who moreover remain still buyers for more than 30,000 cantars besides the tenders they have already received.

The position of the cotton bought by the Government until yesterday is as follows:

Cantars	1,308,500	Sakels
,,	1,605,750	Ashmouni
Total cantars	2,914,250	

It seems that the Government have decided to build very large stores to warehouse their cotton before the coming of the next crop, and that they are going to steam press the whole or the larger part of their cotton stocks. Steam pressing has two obvious advantages. It allows to warehouse in the same store about three times more steam-pressed than hydraulic pressed cotton, and the cotton in the steamed-pressed bales is less subject to deterioration than in the hydraulic.

As regards the sale of the Government cotton the National Bank of Egypt has issued a circular stating that in accordance with instructions received from the Government they will sell the Government cotton on the terms of "filière" and not on the terms of Minet el Bassal, and the price differences for the various grades above and below F.G.F. will be those which had been fixed by the Alexandria General Produce Association for the third May tender for Sakels and the third June tender for Ashmouni/Zagora.

Crop. Climatic conditions continue favourable, and the crop is making a normal progress. Leaf-worm is very abundant, but this pest cannot affect at all the ultimate size of the crop, although it means much trouble and expense to growers whose fields have been attacked.

Messrs. Reinhart & Co., Alexandria, write as follows under date July 4, 1930:—

Up to now the purchases effected by the Egyptian Government amount to:

Received in		Sakellaridis Cantars	Ashmouni Cantars
November,	1929	9,250	—
December,	,,	—	235,000
January,	1930	101,000	—
February,	,,	—	96,000
March,	,,	643,250	—
April,	,,	—	479,500
May,	,,	440,000	—
June,	,,	—	795,250
July,	,,	1,000	—
		1,194,500	1,605,750
Purchases of July, 1930		112,750	

An official communiqué issued by the Ministry of Finance this week states that the Government has decided to press 1,500,000 cantars of its cotton. This measure has been taken in order to reduce warehouse expenses, and especially also to gain space, which theoretically is strengthening the technical position of Egyptian futures, because steam-pressed cotton cannot be tendered against contracts according to the Rules and Regulations of the Alexandria Cotton Exchange.

Business on the spot market has been insignificant this week and is not worth mentioning.

The futures market, on the contrary, has been more lively, on account of some local riots in the Interior on the occasion of a political tour of Nahas Pacha and other members of the last Ministry, which induced some " Bulls " to liquidate their positions. In the meantime further political manifestations have been forbidden by the new Ministry.

NEW CROP.

The following is a summary of the information received by the Alexandria General Produce Association regarding the state of the crop during the month of June.

" *Lower Egypt.* With the exception of a few cool days and nights in the later part of the month, the temperature during June was favourable. The plants have partially recovered their backwardness reported at the beginning of the season.

The plants are in good condition and evenly developed.

Leaf-worm egg masses have been observed everywhere. For the most part they have been destroyed by picking the affected leaves, and the damage caused is insignificant.

Sakellaridis plants have been subjected to attacks of wilt, but on a smaller scale than last year.

Water for irrigation has been sufficient.

Upper Egypt and Fayoum. The temperature has been generally favourable. The plants are in good condition, and slightly in advance of last year.

Leaf-worm egg masses have been reported, but have caused no damage.

Water for irrigation has been sufficient."

EXPORTS OF EGYPTIAN COTTON CLASSIFIED BY VARIETIES AND COUNTRIES OF DESTINATION FROM THE BEGINNING OF THE SEASON TO THE END OF THE FIRST WEEK * OF JULY —TABLE III—

Countries of Destination	Unit	Sakellaridis 1930	Sakellaridis 1929	Ashmouni 1930	Ashmouni 1929	Pilion 1930	Pilion 1929	Other Kinds 1930	Other Kinds 1929	TOTAL 1930	TOTAL 1929	Ratio per 1,000 1930	Ratio per 1,000 1929
United Kingdom ..	bales	114,363	123.477	140,231	184,058	7,802	14,516	17,842	14 417	280,238	336,468	354·3	350·6
British India	„	1,355	604	1.482	10	216	135	1,753	—	4,806	749	6·0	0·8
Austria	„	1,190	830	4,770	5,010	—	150	34	—	5,994	5,990	7 6	6 3
Belgium	„	415	470	4,977	6,502	28	55	317	238	5,737	7,265	7 2	7 6
China	„	—	10	1,000	1,420	—	100	200	—	1,200	1,530	1·5	1·6
Czecho-Slovakia ..	„	3,506	3 693	11,925	14,870	432	953	271	218	16,134	19 734	20·7	20 8
France	„	43,627	48.627	60,460	68,874	2,131	3,540	2.922	4,229	109,140	125,270	139·0	131·5
Germany	„	8,584	5,685	43,079	36,297	9.899	12,049	2,499	1,807	64,061	55,828	81 6	58 8
Greece	„	65	47	77	76	10	—	290	258	442	381	0 5	0·4
Holland	„	225	150	635	302	90	—	20	—	970	452	1 2	0·5
Hungary	„	393	287	861	638	72	54	—	—	1,326	979	1·7	1·0
Italy	„	17,999	20.669	32,913	43,194	348	927	803	2,080	52,063	66,870	66·0	70·1
Japan	„	11 386	15,248	14.088	18,829	1,601	4.021	2 825	156	29,900	38,254	37·8	40·0
Palestine	„	—	4	—	10	—	—	1	75	1	89	—	—
Poland	„	2,510	2,734	2,901	4,557	240	735	492	234	6,143	8 260	7·9	8·8
Portugal	„	577	488	620	275	20	—	18	—	1,235	763	1·6	0·8
Russia	„	20,901	24,750	18,576	22,417	531	1 570	3 040	700	43,048	49,437	57 2	51·8
Spain	„	6,948	5.794	19,833	15,025	1,335	1,475	613	625	28,729	22,919	36·7	24·0
Sweden	„	60	—	526	210	80	20	15	—	681	230	0·9	0·2
Switzerland	„	10,631	11,886	22,410	23,481	4,260	4,609	3,477	1,742	40,778	41 718	52·0	44·0
U. States of America ..	„	23,796	45,819	60,512	123,538	583	342	6,147	1,810	91,038	171,509	115·9	179·8
Other countries ..	„	150	271	1,830	250	—	—	9	12	1,989	533	2 7	0·6
Total	„	268,681	311,543	433,706	569,843	29,678	45 251	43,588	28,601	785,653	955,238	1,000	1,000

Note—Net weight.

*—Ending 2 for 1930 and 3 for 1929.

THE

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East Indian Cotton.

Analysis of Indian Cottons.

A study of the following tables compiled after careful tests undertaken in the Technological Laboratory of the Indian Central Cotton Committee at Matunga, Bombay, will repay spinners, as they will no doubt find that there are some Indian cottons which might suitably replace higher priced American cottons

Any of the reputed cotton shippers in Bombay will know the cottons under the names mentioned in these lists, though they are not the recognized trade names The British Cotton Growing Association Ltd, Royal Exchange, Manchester, sells Punjab-American cotton from its own and surrounding plantations in the Punjab. For the supply of Indian cottons we refer spinners to the shippers advertising in this Bulletin.

The question of the more extended use of Indian cottons is dealt with at length in the report "*The Cotton Industry of India,*" which Mr. Arno S. Pearse has written recently on behalf of the International Cotton Federation A copy of this Report will be forwarded to each individual mill affiliated with the Federation in the course of this month. Non-members may purchase the report at £1 1s from the Head Office, 238, Royal Exchange, Manchester.

The Technological Laboratory of the Indian Central Cotton Committee, Matunga, Bombay, is constantly making tests with old and new cottons, and issues immediately the results obtained in separate bulletins. Spinners interested in Indian cottons are strongly recommended to apply to the Secretary of the above institution to be placed on the mailing list for these bulletins, which may be had for a trivial charge.

SUMMARY OF SPINNING TEST RESULTS

Compiled by the Technological Laboratory

(a) BOMBAY AND

1	2	3	4	5	6	7	8	9	10	11	12	13	14
				Waste Percentages				Ring Frame Particulars*					
												L	
Sample No.	Cotton	Season	Counts Nominal	Blow-room Loss	Card-room Loss	Spinning Loss	Total Loss	Yarn Breakages per 100 spindles per hr.	Front Roller Speed r.p.m.	Draft	Turns per inch	Counts Actual	Strength (lbs.)
62	Dharwar 1 ..	.. 1923–24	20	6·4	7·8	0·7	11·3	0	183	4·49	16·85	19·7	97·5
72	„ ..	.. 1924–25	20	14·7	8·7	0·9	22·7	32	183	4·39	16·85	19·1	100·2
128	„ ..	.. 1925–26	20	12·2	7·1	0·4	18·8	7	182	4·60	16·85	19·6	90·6
254	„ ..	.. 1926–27	20	12·6	7·4	0·3	19·3	2	190	4·35	16·85	19·0	98·6
373	„ ..	.. 1927–28	20	13·0	8·0	0·1	20·0	2	191	4·33	16·85	20·0	88·7
497	„ ..	.. 1928–29	20	14·0	8·8	0·3	21·9	5	192	4·30	16·85	20·1	91·2
70	Gadag 1 ..	.. 1923–24	20	4·5	7·1	0·8	12·1	12	183	4·59	16·85	19·7	86·0
71	„ ..	.. 1924–25	20	8·4	8·8	1·3	17·5	35	183	4·35	16·85	19·6	59·6
131	„ ..	.. 1925–26	20	8·8	8·5	0·5	16·9	10	180	4·76	16·85	19·6	75·7
244	„ ..	.. 1926–27	20	6·6	7·5	0·3	13·8	3	192	4·44	16·85	19·4	99·4
368	„ ..	.. 1927–28	20	5·5	7·8	0·1	13·1	2	190	4·67	16·85	19·7	94·1
513	„ ..	.. 1928–29	20	8·7	8·6	0·6	17·1	41	191	4·30	16·85	20·2	71·0
104	Surat 1027 A.L.F..	.. 1923–24	20	6·3	8·0	0·6	14·3	10	182	4·12	16·85	19·8	75·1
83	„	.. 1924–25	20	5·2	7·6	0·4	12·8	0	181	4·00	16·85	19·3	96·0
116	„	.. 1925–26	20	5·3	7·2	0·6	12·6	15	182	4·12	16·85	19·9	72·8
246	„	.. 1926–27	20	6·1	7·2	0·4	13·3	10	192	4·39	16·85	19·6	88·1
363	„	.. 1927–28	20	3·6	7·7	0·2	11·2	0	190	5·00	16·85	20·0	79·0
487	„	.. 1928–29	20	4·6	7·5	0·2	11·9	17	190	4·44	16·85	19·5	95·8
161	Wagad 4 ..	.. 1925–26	14	8·0	12·6	0·5	20·8	3	188	7·32	15·97	13·8	92·1
272	„ ..	.. 1926–27	14	7·8	8·5	0·5	16·0	17	166	7·26	15·08	14·4	94·5
371	„ ..	.. 1927–28	14	9·7	9·1	0·3	18·2	3	192	5·71	15·08	14·5	99·6
493	„ ..	.. 1928–29	14	7·8	8·2	0·2	15·7	6	191	5·74	15·08	14·3	94·9
160	Wagad 8 ..	.. 1925–26	14	8·3	12·8	0·4	20·2	13	174	6·85	15·97	13·7	84·7
271	„ ..	.. 1926–27	14	7·4	8·4	0·4	15·5	3	166	6·89	15·08	14·0	88·4
372	„ ..	.. 1927–28	14	9·0	9·7	0·1	18·0	0	192	5·59	15·08	14·6	88·8
494	„ ..	.. 1928–29	14	5·4	7·6	0·2	12·8	10	194	5·74	15·08	14·3	92·4
81	P.A. 4 F ..	.. 1924–25	20	7·9	7·3	1·2	15·7	22	181	5·27	16·85	19·3	65·1
127	„ ..	.. 1925–26	20	6·7	6·5	0·1	13·1	2	180	4·60	16·85	19·5	67·7
232	„ ..	.. 1926–27	20	9·5	9·5	0·3	18·4	10	191	5·32	16·85	19·8	75·2
340	„ ..	.. 1927–28	20	6·4	7·8	0·3	14·0	37	187	5·21	16·85	19·4	66·5
448	„ ..	.. 1928–29	20	8·6	10·0	0·5	18·2	57	175	5·23	16·85	19·9	43·5
106	P.A. 285 F ..	.. 1923–24	20	10·3	10·2	0·8	20·1	0	182	4·12	16·85	19·2	100·0
85A	„ ..	.. 1924–25	20	4·7	9·8	0·6	14·6	15	181	4·26	16·85	19·0	97·0
115	„ ..	.. 1925–26	20	10·8	11·1	0·4	21·1	10	182	4·17	16·85	19·3	82·9
233	„ ..	.. 1926–27	20	12·2	12·3	0·4	23·3	7	190	4·52	16·85	19·1	92·0
367	„ ..	.. 1927–28	20	8·4	12·4	0·3	20·0	5	191	4·55	16·85	19·8	85·3
478	„ ..	.. 1928–29	20	8·2	11·7	0·1	19·2	7	194	4·35	16·85	19·3	96·1
80	P.A. 289 F ..	.. 1924–25	20	8·7	9·0	0·4	17·2	22	181	4·81	16·85	20·4	88·5
130	„ ..	.. 1925–26	20	8·4	9·3	0·6	17·4	22	183	4·65	16·85	20·2	84·2
234	„ ..	.. 1926–27	20	12·7	12·1	0·3	23·0	5	191	4·58	16·85	19·3	107·5
341	„ ..	.. 1927–28	20	8·5	10·5	0·2	18·3	0	191	4·51	16·85	19·6	104·2
449	„ ..	.. 1928–29	20	10·8	13·4	0·2	23·0	7	193	4·49	16·85	20·6	89·3
122	Mollisoni ..	.. 1925–26	8	5·1	7·7	1·2	13·4	0	174	5·06	12·07	8·0	76·5
230	„ ..	.. 1926–27	8	7·1	8·2	0·3	15·0	15	185	4·83	12·07	7·7	111·3
324	„ ..	.. 1927–28	8	4·0	6·7	0·3	10·7	20	200	5·58	12·07	7·9	101·8
450	„ ..	.. 1928–29	8	5·1	9·0	0·3	14·0	5	182	5·41	12·07	7·7	79·0

*** The ring frame front roller diameter used in these tests has a diameter of ⅞ in.**

ON STANDARD INDIAN COTTONS, 1923-29

of the Indian Central Cotton Committee

PUNJAB COTTONS

15	16	17	18	19	20	21	22	23	24	25	26	27	28	29
YARN TEST RESULTS											Temperature (° F.)	Relative Humidity (%)		
		SINGLE THREAD												
Strength Irregularity (%)	Count-Strength Product	Counts	Strength (ozs.)	Strength Irregularity (%)	Weakness Percentage	Extension (%)	Extension Irregularity (%)	Evenness Class	Neps per yard	Turns per inch Actual	Spinning Room	Spinning Room	Testing Room	Highest Standard Warp Counts
4·7	1,021	--	10·7	9·6	2·4	4·2	10·5	2	1·2	-	86	70	59	34
4·7	1,914	—	13·6	7·1	-	4·4	10·0	2	1·2	-	83	79	61	31
4·9	1,776	-	11·7	8·5	0·5	6·1	10·7	3	4·0		90	63	60	31
5·0	1,873	19·1	13·3	10·2	1·7	7·1	7·5	1	1·9	16·2	91	65	78	34
5·6	1,774	20·2	12·3	12·1	1·5	6·6	8·5	3	2·7	16·2	88	65	69	32
3·5	1,833	20·5	12·1	8·6	1·0	7·3	8·2	2	1·1	16·3	88	61	69	34
6·7	1,604	-	10·2	9·6	2·8	3·6	14·1	2	1·1	-	81	77	55	36
6·5	1,168		9·4	7·4	0·2	4·8	9·5	3	2·5	-	81	76	61	20
6·3	1,481	-	10·6	12·4	4·2	6·0	11·6	3	5·2	-	91	67	65	30
4·0	1,928	19·7	13·4	11·6	3·2	7·8	7·6	1	2·9	16·0	91	63	81	38
5·2	1,854	20·5	13·0	9·5	1·7	7·3	8·1	2	3·9	16·3	88	65	67	38
5·8	1,434	20·0	10·3	12·0	3·7	6·3	7·8	3	2·1	16·2	91	63	60	26
6·1	1,487	--	10·6	8·9	·	5·7	9·2	-	—	—	86	60	49	30
4·1	1,853	—	10·9	9·6	1·0	5·0	11·6	3	1·2		86	70	61	32
8·9	1,149		10·9	11·9	1·2	5·6	9·5	2	2·1		86	65	65	26
4·2	1,727	—	12·3	8·1	0·2	6·7	6·7	2	2·0	16·2	89	61	64	32
6·9	1,580	20·3	10·5	9·8	2·2	5·9	7·8	2	3·1	16·4	85	59	64	30
4·2	1,868	19·9	12·5	9·2	0·7	7·0	7·0	3	3·3	16·3	88	68	67	32
5·0	1,271	—	13·1	10·6	2·5	6·1	9·3	3	1·7	--	85	81	78	14
5·6	1,361	14·6	13·3	11·0	0·7	8·0	6·6	3	1·6	14·7	85	71	71	16
4·2	1,444	14·8	13·8	8·1	- -	8·5	5·9	3	3·6	14·6	86	62	68	18
4·8	1,357	14·6	12·8	9·9	2·2	9·0	7·7	3	2·1	11·8	87	71	72	16
7·5	1,160	—	12·5	9·9	1·5	6·2	9·8	3	1·2	14·7	87	81	82	12
6·0	1,238	14·4	11·8	12·9	5·5	7·9	7·3	4	1·2	14·9	87	76	72	14
4·6	1,296	14·8	11·8	10·0	2·7	8·4	9·0	3	4·0	11·7	88	63	70	11/16
4·8	1,321	14·8	12·5	9·6	1·5	8·2	7·2	3	1·2	14·5	89	65	71	11/16
6·8	1,256		8·7	33·6	7·0	4·7	17·5	5	1·4		73	75	61	22
7·3	1,320	--	9·3	12·3	5·5	5·2	16·3	3	1·4		91	63	58	22
4·6	1,489	20·2	10·1	10·7	3·5	8·9	6·6	3	3·1	16·3	88	63	78	21
6·5	1,290	19·5	9·2	13·5	6·5	7·4	9·9	3	1·9	16·3	81	60	65	22
8·7	868	20·0	8·0	15·6	9·5	7·3	8·7	5	1·3	36·4	83	67	70	16
4·7	1,020	·	12·6	9·9	2·0	6·6	9·4	-		-	81	69	57	34
6·6	1,843		11·5	9·3	1·2	1·5	16·1	3	1·5	- -	85	66	55	34
4·8	1,600		11·5	9·9	1·7	6·1	10·2	3	5·0		86	64	62	28
3·8	1,757	19·4	12·8	9·7	1·0	7·5	6·8	3	28·1	16·4	90	60	76	31
4·1	1,689	20·1	12·4	10·3	2·0	6·8	7·1	3	13·2	16·3	89	64	68	34
4·8	1,855	19·6	13·3	10·0	2·5	7·8	8·5	3	20·7	16·3	83	65	72	34
8·5	1,805	-	11·7	8·2	2·2	6·5	8·3	4	5·6	—	71	72	61	36
9·7	1,701		12·0	9·5	3·5	5·5	8·8	2	7·5	- -	91	62	64	30
7·4	2,075	19·9	14·8	9·5	1·2	7·6	8·3	2	28·7	16·4	90	65	70	38
5·3	2,042	19·5	14·2	10·1	1·5	6·5	8·5	2	4·9	16·3	83	69	66	40
5·0	1,840	20·0	12·8	11·5	3·7	6·9	8·2	3	16·4	16·2	84	66	68	38
10·3	613	--	13·0	8·2	14·7	7·5	12·7	6	0·7	---	84	61	68	6
6·6	858	7·6	15·5	18·5	11·5	12·6	9·4	5	1·0	11·8	89	64	81	8
8·5	804	8·2	13·5	16·4	11·5	9·0	8·6	4	1·2	11·8	83	66	68	8
9·0	608	7·9	14·2	16·2	10·0	10·3	9·1	5	1·6	12·0	84	67	68	6/8

(b) UNITED PROVINCES, CENTRAL

1	2	3	4	5	6	7	8	9	10	11	12	13	14
				Waste Percentages				Ring Frame Particulars*					L
Sample No.	Cotton	Season	Counts Nominal	Blow-room Loss	Card-room Loss	Spinning Loss	Total Loss	Yarn Breakages per 100 spindles per hr.	Front Roller Speed r.p.m.	Draft	Turns per inch	Counts Actual	Strength (lbs.)
22	Aligarh A. 19	1924–25	8	4·6	7·5	1·2	12·8	20	220	4·80	12 07	7·7	82·0
111	„	1925–26	8	5·0	8·0	1·3	13·7	55	200	5·00	12·07	7·8	108·8
227	„	1926–27	8	3·8	7·9	0·3	11·7	35	172	4·72	12·07	7·8	75·1
352	„	1927–28	8	3·1	7·9	0·5	11·2	10	180	5·20	12·07	7·9	87·9
482	„	1928–29	8	3·3	6·7	0·3	10·1	35	180	5·37	12·07	8·0	80·7
79	Cawnpore K. 22	1924–25	10	8·4	7·7	0·4	15·9	35	211	5·27	12·63	9·5	117·2
129	„	1925–26	10	6·3	10·4	0·8	16·7	25	195	5·95	12·63	9·7	125·6
228	„	1926–27	10	4·0	6·9	0·4	10·9	5	198	5·38	12·63	9·7	107·1
351	„	1927–28	10	6·4	7·3	0·4	13·6	10	196	4·71	12·63	10·0	99·9
461	„	1928–29	10	5·9	7·9	0·2	13·5	5	192	4·35	12·63	10 5	118·8
78	Bundelkhand J. N. 1	1924–25	10	5·7	7·1	0·8	12·1	75	192	5·80	13·58	10·4	115·7
113	„	1925-26	10	5·7	7·8	0·7	13·7	10	183	5·88	12·63	9·8	101·7
229	„	1926-27	10	7·1	7·2	0·3	14 2	5	206	4 88	12·63	9·9	118·5
350	„	1927–28	10	6·9	8·7	0·3	15·3	0	198	4·59	12·63	10·5	108·5
456	„	1928–29	10	5·0	7·0	0·3	12·0	10	197	4·55	12·63	10·4	107·1
77	Cawnpore C. A. 9	1924–25	20	6·9	7·6	0·7	14·5	10	184	4·49	16·85	19·1	84·4
112	„	1925–26	20	6·6	9·4	0·5	15·8	17	182	4·00	16·85	19·0	83·5
231	„	1926–27	20	6·9	7·0	0·3	14·6	10	190	4·35	16·85	19·1	91·2
349	„	1927-28	20	6·7	8·6	0·3	15·0	7	193	4·25	16·85	19·9	76·6
457	„	1928 29	20	8·9	10·0	0·3	18·2	2	190	4·65	16·85	20·1	97·2
247	Verum 262 (Nagpur)	1926–27	20	8·6	10·7	0·4	18·6	2	180	6·76	16·85	20·1	60·0
348	„	1927–28	20	3·3	6·5	0·2	9·7	5	190	4·90	16·85	19·6	73·9
468	„	1928–29	20	7·6	10·2	0·3	17·4	10	182	5·26	16·85	19·4	72·0
320	Verum (Akola)	1927–28	20	6·5	6·5	0·2	12·8	10	180	5·32	16·85	19·2	57·5
435	„	1928–29	20	4·4	7·3	0·3	11·7	40	195	4·70	16·85	20·0	60·7
82	Umri Bani	1924–25	20	15·9	10·7	0·7	25·3	30	182	5·20	16·85	19·7	60·7
114	„	1925–26	20	12·9	8·6	0·5	20·8	2	181	5·13	16·85	19·3	70·6
203	„	1926–27	20	11·5	7·6	0·3	18·5	15	183	5·15	16·85	20·4	64·2
333	„	1927–28	20	11·6	9·0	0·4	19·9	10	186	5·18	16·85	20·1	65·9
451	„	1928–29	20	11·7	8·9	0·2	19·8	35	193	5·33	16·85	20·0	61·8

* The ring frame front roller diameter used in these tests has a diameter of ⅞ in.

PROVINCES, AND HYDERABAD COTTONS

15	16	17	18	19	20	21	22	23	24	25	26	27	28	29
		Yarn Test Results									Temperature (° F.)	Relative Humidity (%)		
LA		Single Thread												
Strength Irregularity (%)	Count-Strength Product	Counts	Strength (ozs.)	Strength Irregularity (%)	Weakness Percentage	Extension %	Extension Irregularity (%)	Evenness Class	Neps per yard	Turns per inch Actual	Spinning Room	Spinning Room	Testing Room	Highest Standard Warp Counts
15·6	631	—	17·7	16·1	9·2	5·2	10·6	6	- -	—	90	65	76	6/8
7·9	819	-	17·0	15·2	10·0	7·1	11·4	3	0·7	--	83	61	65	8
7·5	586	- -	15·6	13·6	4·5	8·9	9·4	6	0·5	—	87	63	64	6/8
8·3	691	8·1	15·0	16·8	11·0	7·1	9·9	4	0·7	11·8	81	65	54	6/8
9·9	646	8·0	16·2	18·1	12·2	8·6	9·4	6	0·9	11·6	84	68	71	6/8
8·6	1,113	·	19·7	13·2	5·0	7·3	10·7	5	1·7	--	76	75	51	12
6·3	1,218	· ·	19·0	12·1	2·7	5·7	15·3	3	4·5	- -	92	62	62	12
4·3	1,039		16·5	14·3	7·5	8·7	7·6	4	1·0		88	67	65	12
6·9	909	10·4	11·5	12·6	5·2	7·5	8·7	3	1·2	12·3	81	68	61	12
4·4	1,247	10·1	18·0	10·0	2·7	7·8	6·6	3	1·6	12·3	83	68	71	14
9·8	1,203	-	18·8	10·7	3·0	10·7	13·4	3	0·6	--	80	77	61	12
10·4	997		17·4	17·4	11·5	7·3	14·4	3	1·7	—	85	69	66	12
6·7	1,173	9·2	17·9	14·0	5·5	9·2	8·6	3	0·6	12·4	90	60	79	14
5·8	1,139	10·5	17·8	11·4	6·2	6·9	8·7	3	1·6	12·3	80	66	44	12
6·4	1,114	10·9	15·3	14·3	6·0	8·4	8·8	3	0·9	12·2	83	63	70	12/14
7·2	1,612	-	12·0	9·2	1·7	4·5	15·9	4	2·0	—	82	76	56	28
6·0	1,587		11·6	10·3	2·7	5·7	10·4	3	3·1	—	84	64	66	28
6·0	1,712	19·5	12·8	14·6	7·5	7·2	7·3	3	3·0	16·3	80	65	79	34
5·7	1,521	20·3	10·4	16·1	8·7	5·4	10·5	3	3·2	16·2	82	67	68	30
5·8	1,951	20·7	12·9	10·5	1·0	6·7	6·4	3	4·6	16·1	83	60	75	40
9·5	1,224	-	10·6	12·0	1·0	7·2	7·0	4	2·1	--	88	68	62	24
7·1	1,118	20·1	10·6	11·1	3·0	7·0	5·8	3	1·9	16·2	81	73	68	26
9·6	1,307	19·8	9·9	14·5	6·5	6·2	8·7	4	3·3	16·2	84	60	72	26
7·8	1,101	19·7	9·3	13·6	6·0	6·3	6·8	3	1·2	16·3	81	64	61	18/20
8·5	1,214	20·4	10·0	13·2	6·5	6·6	7·4	3	3·3	16·4	83	69	71	22/24
8·6	1,196	—	9·3	13·4	8·5	5·1	10·9	5	4·1	—	72	72	55	22
10·0	1,363	—	9·6	13·0	3·2	5·0	16·2	3	4·5	—	85	64	62	24
7·3	1,310	—	10·0	13·3	6·7	5·8	9·7	3	1·6	—	83	69	51	24
6·4	1,325	21·7	9·4	15·2	9·7	6·7	8·4	3	4·1	16·3	82	68	67	24
9·7	1,236	20·1	10·4	13·7	6·5	6·6	7·6	4	3·1	16·3	79	65	68	22

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	2	3	4	5	6	7	8	9	10	11	12	13	14
				Waste Percentages				Ring Frame Particulars*				L	
Sample No.	Cotton	Season	Counts Nominal	Blow-room Loss	Card-room Loss	Spinning Loss	Total Loss	Yarn Breakages per 100 spindles per hr.	Front Roller Speed r.p.m.	Draft	Turns per inch	Counts Actual	Strength (lbs.)
105	Co. 1 (295) ..	.. 1923-24	20	4·4	6·3	0·5	11·0	15	181	4·21	16·85	19·7	8·40
84	„ ..	.. 1924-25	20	4·4	7·5	0·5	12·0	7	180	4·22	16·85	19·7	82·7
126	„ ..	.. 1925-26	20	4·8	6·0	0·4	10·9	2	182	4·39	16·85	19·6	88·2
265	„ ..	.. 1926-27	20	4·0	8·7	0·2	12·5	2	192	4·76	16·85	19·8	103·7
374	„ ..	.. 1927-28	20	3·5	7·8	0·1	11·2	2	190	4·54	16·85	20·1	80·5
496	„ ..	.. 1928-29	20	4·4	8·1	0·3	12·6	10	196	4·17	16·85	19·5	88·5
50	Co. 2 (440) ..	.. 1924-25	20	2·5	11·5	1·1	12·4	37	186	4·08	16·85	19·8	83·3
124	„ ..	.. 1925-26	20	3·5	8·7	0·8	12·6	15	182	4·30	16·85	19·3	74·0
268	„ ..	.. 1926-27	20	3·7	9·5	0·4	13·2	22	189	4·44	16·85	19·6	97·1
375	„ ..	.. 1927-28	20	3·2	8·4	0·1	11·6	10	190	4·44	16·85	19·6	89·0
505	„ ..	.. 1928-29	20	4·7	9·5	0·4	14·1	10	191	4·41	16·85	19·4	75·3
73	Nandyal 14..	.. 1923-24	20	5·9	7·5	0·9	13·7	10	182	4·35	16·85	19·3	93·5
74	„ ..	.. 1924-25	20	8·2	8·1	0·5	16·1	27	180	4·33	16·85	19·2	96·9
162	„ ..	.. 1925-26	20	8·6	8·9	1·0	17·6	22	179	4·27	16·85	19·8	77·2
273	„ ..	.. 1926-27	20	8·5	8·6	0·5	16·8	30	189	4·55	16·85	19·9	88·7
378	„ ..	.. 1927-28	20	7·3	8·7	0·4	15·7	10	192	4·52	16·85	19·6	81·9
506	„ ..	.. 1928-29	20	4·8	8·0	0·3	12·7	17	192	4·35	16·85	20·2	79·9
65	Hagari 1 ..	.. 1924-25	20	4·5	10·2	0·5	14·6	5	183	4·49	16·85	19·6	83·1
140	„ ..	.. 1925-26	20	4·4	11·1	0·6	15·4	17	181	4·39	16·85	19·1	87·1
255	„ ..	.. 1926-27	20	2·6	7·7	0·3	10·4	12	190	4·30	16·85	19·2	83·4
507	„ ..	.. 1928-29	20	3·9	6·9	0·2	10·8	35	191	4·44	16·85	19·6	66·7
75	Hagari 25 ..	.. 1923-24	20	9·8	8·1	0·9	17·8	7	183	4·35	16·85	19·1	75·0
76	„ ..	.. 1924-25	20	5·4	7·1	0·4	12·3	12	183	4·44	16·85	19·5	87·4
163	„ ..	.. 1925-26	20	5·5	8·8	0·4	14·2	20	180	4·30	16·85	19·8	75·0
269	„ ..	.. 1926-27	20	5·1	8·6	0·6	13·7	11	193	4·44	16·85	20·0	75·4
377	„ ..	.. 1927-28	20	5·9	8·3	0·3	13·8	15	190	4·55	16·85	19·3	78·8
508	„ ..	.. 1928-29	20	5·5	13·2	0·5	18·3	7	194	4·70	16·85	19·3	93·5
86	Karungani C. 7	.. 1924-25	20	5·8	8·3	1·1	14·5	17	182	4·04	16·85	19·6	70·4
175	„ ..	.. 1925-26	20	4·1	7·9	0·3	11·9	7	184	4·30	16·85	20·1	70·1
270	„ ..	.. 1926-27	20	2·8	8·0	0·6	11·1	20	193	4·35	16·85	20·1	68·6
383	„	.. 1927-28	20	5·3	8·5	0·2	13·5	32	196	4·57	16·85	19·8	70·5
510	„	.. 1928-29	20	4·4	8·2	0·6	12·8	57	188	4·37	16·85	19·4	56·7
55	Mississippi ..	.. 1923-24	20	4·4	7·3	0·4	11·8	17	157	4·35	16·85	19·5	95·2
200	Memphis ..	.. 1925-26	20	6·5	8·1	0·3	14·4	5	159	4·55	16·85	19·7	103·8
56	Texas ..	.. 1923-24	20	5·4	9·0	1·3	14·9	32	180	5·81	16·85	19·8	01·4
206	„ ..	.. 1925-26	20	5·2	6·7	0·3	11·8	5	182	4·50	16·85	20·1	84·3

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* The ring frame front roller used in the spinning of these yarns has a diameter ⅞ in., except for samples

AMERICAN COTTONS

15	16	17	18	19	20	21	22	23	24	25	26	27	28	29
YARN TEST RESULTS											Temperature (° F.)	Relative Humidity (%)		
SINGLE THREAD														
Strength Irregularity (%)	Count-Strength Product	Counts	Strength (ozs.)	Strength Irregularity (%)	Weakness Percentage	Extension (%)	Extension Irregularity (%)	Evenness Class	Neps per yard	Turns per inch Actual	Spinning Room	Spinning Room	Testing Room	Highest Standard Warp Counts
6·4	1,667		10·5	11·4	3·2	4·4	13·1	2	1·2	--	86	72	51	20
3·8	1,629	-	11·9	6·9		6·5	6·3	3	1·0	-	87	74	58	33
4·0	1,729		11·3	7·7	0·7	6·0	8·4	1	2·5		89	65	60	32
3·9	2,053	19·9	13·6	8·6	0·7	7·9	6·2	1	3·6	16·1	87	71	78	38
5·0	1,799	20·3	12·1	8·6	1·0	6·5	8·2	2	2·4	16·3	87	62	69	34
4·5	1,726	19·7	12·0	8·7	0·7	8·0	7·1	2	1·8	16·2	86	62	73	32
8·9	1,649		12·2	7·3		4·2	5·0					-		28/30
6·5	1,428		10·4	10·3	1·0	5·7	7·4				89	64	59	24, 26
3·4	1,903	19·9	12·6	8·5	2·0	7·5	7·4	1	4·4	16·3	85	80	79	36, 38
4·9	1,714	20·0	12·0	10·2	2·5	7·4	5·6	3	8·4	16·2	90	66	68	32/34
4·6	1,461	20·3	9·6	9·2	2·2	6·8	8·5	3	6·7	16·1	90	66	71	26
6·0	1,805		13·8	11·2	3·2	5·9	9·5	3	1·9		84	73	57	34
7·4	1,860		10·8	11·0	5·8	3·3	19·0	4	3·0	-	83	82	56	32
8·8	1,529		11·8	7·7	1·5	5·9	6·5	1	6·7		87	79	80	32
6·5	1,765	19·9	12·4	10·3	1·7	6·7	6·3	3	1·0	16·3	84	80	72	32
9·6	1,605	20·5	10·9	12·8	6·0	6·4	8·0	3	7·1	16·2	90	67	69	30/34
7·4	1,610	20·9	11·5	13·6	6·0	6·9	7·2	2	4·1	16·2	91	66	69	30/32
4·8	1,620		12·3	8·9	1·4	4·6	12·3	-		-	85	70	60	30
5·0	1,664		11·6	8·1		5·9	8·7	3	3·7		92	67	68	30
5·2	1,601	19·3	11·6	12·0	1·3	7·6	7·1	1	0·6	16·3	86	79	84	26/28
4·9	1,307	20·1	10·1	13·2	6·0	7·0	7·3	2	0·8	16·3	92	69	68	24
10·4	1,132		11·8	9·4	0·2	4·5	11·0	3	1·0	-	82	82	55	24
5·9	1,704	·	11·0	8·4	1·0	4·7	12·6	3	1·5	-	80	72	63	28
6·4	1,485		10·6	10·4	1·2	6·0	10·2	3	6·0		85	82	78	26
6·5	1,508	20·3	10·6	13·2	3·2	6·6	8·9	3	1·0	16·3	85	80	77	26
4·9	1,521	19·6	10·6	12·7	6·5	6·7	8·9	3	1·6	16·3	80	67	69	26
3·0	1,801	20·0	11·8	10·5	3·2	7·3	7·9	2	2·2	16·1	91	62	70	30
7·1	1,556		9·8	10·9	3·0	5·2	8·3	3	2·5	--	87	71	51	26
9·4	1,409		10·6	13·4	4·7	5·6	10·4	3	1·7	-	87	68	67	26
6·8	1,379	20·3	9·5	11·6	7·5	6·2	7·7	3	3·9	16·2	85	70	72	24
6·8	1,306	19·9	10·7	11·4	7·4	5·8	8·1	3	3·2	16·3	91	64	60	24
5·7	1,099	19·6	9·7	11·8	5·5	6·6	10·0	4	1·2	16·2	91	65	70	20
5·4	1,856	--	10·2	11·6	3·6	5·7	16·8	1	1·4	—	88	87	86	30
4·1	2,015	—	12·9	8·1	--	8·2	7·9	2	1·4	—	81	64	61	40
7·9	1,216	—	8·6	14·5	7·8	3·9	13·4	3	3·9	—	87	79	54	18
4·1	1,694	--	12·0	9·7	0·7	7·8	6·6	3	1·2	—	80	67	66	30

53 and 200 for which the diameter is 1 in.

CONSUMPTION OF COTTON IN INDIA.

STATEMENT OF INDIAN COTTON CONSUMED IN MILLS IN BRITISH INDIA DURING 8 MONTHS ENDING APRIL, 1930.

Published by the Indian Central Cotton Committee ; based on Returns made under the Indian Cotton Cess Act, 1923

	Consumption	
	Since September 1, 1929	During the corresponding period last year
Bombay Island	541,431	398,880
Ahmedabad	239,781	210,399
Bombay Presidency	909,653	727,650
Madras Presidency	137,521	131,257
United Provinces	155,790	119,271
Central Provinces and Berar	82,269	80,329
Bengal	65,572	55,097
Punjab and Delhi	43,711	35,527
Rest of British India	16,039	11,311
Total for British India		

STATEMENT OF RAW COTTON CONSUMED IN MILLS IN INDIAN STATES DURING 8 MONTHS ENDING APRIL, 1930.

	Consumed	
Name of State	Since September 1, 1929	During the corresponding period last year
Hyderabad	13,904	12,318
Mysore	30,116	27,953
Baroda	38,783	31,456
Gwalior	27,383	24,061
Indore	54,008	19,572
Other Indian States (calculated from yarn production)	41,081	37,200
	205,275	182,590

STATEMENT OF LOOSE COTTON RECEIVED IN MILLS IN BRITISH INDIA DURING 8 MONTHS ENDING APRIL, 1930.

	Received	
Province	Since September 1, 1929	During the corresponding period last year
Bombay	11,424	14,972
Madras	22,624	24,605
United Provinces	20,168	13,412
Central Provinces and Berar	12,961	5,951
Punjab	3,210	2,399
Total	70,387	61,339
Grand total	1,686,217	1,407,371

SUPPLEMENTARY ESTIMATE OF THE COTTON CROP OF INDIA.

The Government of India issued on April 24, 1930, the following supplementary estimate of the Indian cotton crop.

SUPPLEMENTARY ESTIMATE OF THE COTTON CROP OF INDIA.
Season 1929 30

Provinces and States	Acres (thousands) 1929 30 Sup.	1928 29 Sup.	Outturn (thousands of bales of 400 lbs each) 1929 30 Feb.	1929 30 Sup.	1928 29 Sup.
Bombay	7,150	8,046	1,090	1,309	1,476
Central Provinces and Berar	5,167	5,078	1,127	1,142	1,334
Madras	2,176	2,495	512	509	528
Punjab	2,496	2,841	777	788	619
United Provinces	932	715	289	342	255
Burma	323	318	67	67	56
Bengal	78	79	21	21	18
Bihar and Orissa	69	78	13	13	14
Assam	41	44	15	15	17
Ajmer-Merwara	34	41	11	11	21
N.W.F. Province	17	17	1	1	1
Delhi	3	2	1	1	1
Hyderabad	3,536	4,019	1,018	447	895
Central India	1,388	1,287	246	249	252
Baroda	771	793	127	127	68
Gwalior	633	645	89	89	107
Rajputana	506	478	104	104	123
Mysore	69	76	22	22	23
Total	25,692	27,053	5,533	5,260	5,811

Descriptions of Cotton	Acres (thousands) 1929 30 Sup.	1928 29 Sup.	Outturn (thousands of bales of 400 lbs. each) 1929 30 Feb.	1929 30 Sup.	1928 29 Sup.	Yield per Acre (lbs.) 1920 30 Sup.	1928-29 Sup.
Oomras :							
Khandeish ..	1,362	1,410	245	248	338	73	96
Central India ..	2,021	1,932	335	338	359	67	74
Barsi-Nagar Hyderabad-Gaorani	3,590	3,986	1,001	472	812	53	81
Berar .. .. Central Provinces	5,167	5,078	1,127	1,142	1,334	88	91 133
Total ..	12,140	12,406	2,711	2,200	2,843	72	92
Dholleras	2,784	3,094	340	522	402	75	52
Bengal Sind :							
United Provinces	932	715	289	342	255	147	143
Rajputana ..	540	520	115	115	144	85	111
Sind Punjab ..	1,981	2,266	580	579	605	117	107
Others	76	85	15	15	16	79	114
Total ..	**3,529**	**3,586**	**999**	**1,051**	**1,020**	**119**	**114**
American :							
Punjab	825	974	245	253	189	123	78
Sind	27	29	5	8	6	119	83
Total ..	852	1,003	250	261	195	123	87

SUPPLEMENTARY ESTIMATE OF COTTON CROP—*Continued*

Descriptions of Cotton	Acres (thousands)		Outturn (thousands of bales of 400 lbs. each)			Yield per Acre (lbs.)	
	1929–30 Sup	1928–29 Sup.	1929–30 Feb.	1929–30 Sup.	1928–29 Sup.	1929–30 Sup.	1928 29 Sup
Broach	1,304	1,270	243	281	209	86	66
Coompta-Dharwars	1,685	1,945	293	291	303	69	62
Westerns & Northerns	1,472	1,835	201	161	349	44	76
Coconadas ..	225	236	45	37	46	66	78
Tinnevellys ..	596	610	160	159	163	107	107
Salems	242	224	41	42	43	69	77
Cambodias ..	403	384	146	151	146	150	152
Comillas, Burmas and other sorts ..	460	460	104	104	92	90	80
Grand Total	25,692	27,053	5,533	5,260	5,811	82	

MARKET REPORTS.

Messrs. Chunilal Mehta & Co., Bombay, in their market letter, dated June 27, state:—

"Since our last report the local market remained closed until Wednesday, owing to the excited political situation in India. Although Americans were more or less steady, the sentiment in the local market was overwhelmingly bearish when it opened on Wednesday. The general trade depression all over the world, the political situation in India, the slump in the New York Stock Market, the weakness in wheat and all commodities in general told upon the price of Indian cotton heavily. Moreover, it was reported that when the East India Cotton Association lifted the ban on the minimum prices the banks called for fresh margins from two or three spot houses who were said to hold large blocks of actual cotton. This further intensified the situation. Bears took hold of this opportunity to hammer the market. Short selling by option dealers also followed. This process of selling reached its culmination in distress liquidation. In short, a regular panic prevailed, and July/August Broach declined to Rs. 196½ on June 25. This low quotation was previously seen only immediately after the declaration of the Great War in 1914. It is said that certain styles of Oomras and Bengals were even quoted below the lowest quotations of 1914. From the point of view of parity, Indian cotton was on June 25 at the lowest parity since the beginning of the season.

However, at low levels export houses, mostly Japanese houses, were buyers, and quotations partly recovered. This morning it is reported that Americans have improved in New York by 37 points, and in sympathy with that the local quotation for July-August Broach is Rs. 215.

Latest cable advices from America show that weather conditions in the Cotton Belt are excellent with practically no weevil. Trade conditions all over the world continue to be bad and the demand for American is comparatively small.

However, the consumption of Indian cotton continues to be at the same rate as before, and the supply is not over-abundant to warrant the recent heavy decline in prices.

The monsoon is active, and cotton districts have received ample rains.

During this past week the Bombay Mill Owners' Association had a series of private conferences with the leaders of the nationalist movement in India. The net outcome of these conferences, it is reported, is that the mill owners have agreed not to increase the prices of manufactured goods until the end of October, and the nationalist leaders, on their part, have agreed to strongly support the *Swadeshi* movement (boycotting foreign cloth and using only Indian-made cloth). Of late, owing to the rapid fall in the price of raw material, the offtake of Indian-made piece goods is not satisfactory. But it is confidently believed that should cotton prices recover the offtake will be large.

Messrs. Volkart Brothers, Winterthur, report under date as follows:—

" *Weather and Crop Report*: Since our last report the monsoon has given good rain practically over the whole of the cotton area, including those parts of the area where rain was slightly deficient before.

In the Broach district and the Central Provinces rain has been so heavy as to retard somewhat field operations. Sowing is being pushed on everywhere now, and in the canal districts of the Punjab and Sindh some of the cotton is fruiting. Crop reports are favourable everywhere.

There are indications that the area under cotton may receive a noticeable diminution this year, owing partly to the low prices ruling for actual cotton now.

Market: Prices in India have been ruling rather steady and there has been a fair amount of buying for export to Europe. The Far East has continued to show great reserve. Takings by Indian mills continue at a rate considerably in excess of last year. Though prices are on a level unprecedentedly low, speculative buying in India, usually so noticeable under similar conditions, is almost absent, in spite of reports which arrived two weeks ago that an Indian buying syndicate had been formed with a capital of five million rupees.

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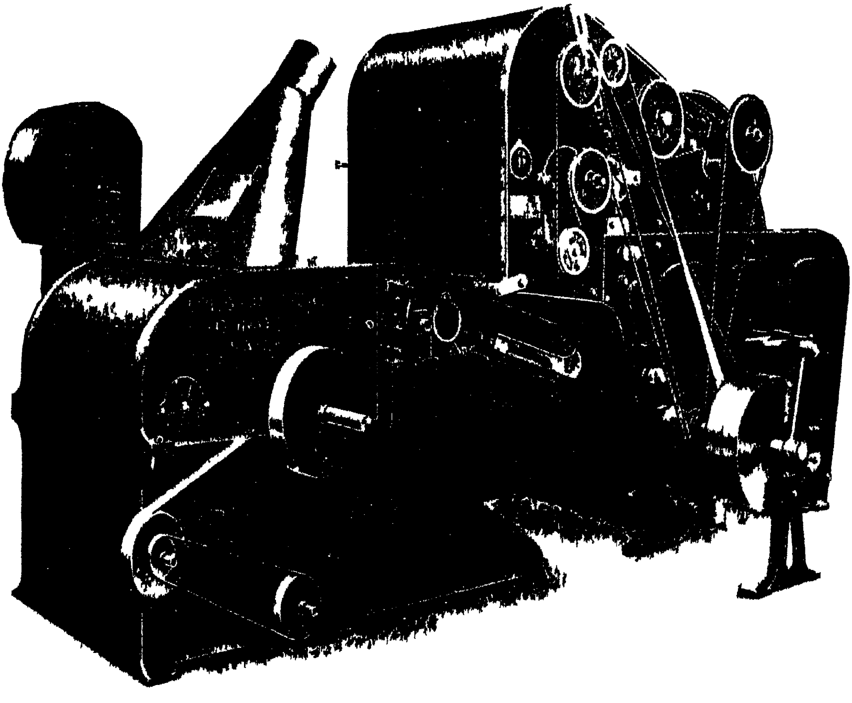

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Power for Textile Mills.

by F. J. Holt, Textile Engineer to the Metropolitan-Vickers Electrical Co. Ltd.

There are still people in Lancashire who believe that the present depression in the cotton industry is entirely due to the longer hours worked and the lower wages paid by their competitors abroad.

While this may be partly true, they completely overlook the fact that the cotton industry abroad is more eager to try out new ideas than we are in Lancashire, with the result that in conjunction with the British textile engineers new machinery and driving arrangements have been developed with the sole object of reducing their production costs.

It is astounding in these modern times to find quite a number of Lancashire mills still being driven by beam engines installed at least 50 to 60, or even more, years ago, also upright shafts driving each floor by bevel wheels, the whole outfit being hopelessly out of date and inefficient. How can they expect to compete against mills with modern equipment?

A typical example of how the driving arrangement of an old mill has been modified and brought up to date by the application of electric drive is shown in Figs. 7 and 8.

Each of the five spinning rooms contained eight pairs of mules, 1⅝ in. gauge, 6,528 spindle total. Length of draw, 64 ins., spindle speed, 10,000 r.p.m., spinning 58's counts. It will be seen from Fig. 7 the original drive was by means of a vertical shaft running at 108 r.p.m., driving each spinning-room lineshaft at 270 r.p.m. through bevel gear. The weight of the vertical shaft and bevel gears alone was 4½ tons, each spinning-room lineshaft was 147½ ft. long and supported in 10 sleeve bearings having bottle-feed oiling arrangements, each lineshaft pulley was 34 ins. diameter driving on to a 16-in. diameter pulley on the mule countershaft, the belt speed being 2,405 ft. per minute.

Fig. 8 shows a plan and elevation of one of the spinning rooms when changed over to electric drive. It will be seen that two 50 horse-power 720 r.p.m. motors were installed, each driving four pairs of mules. The motors were direct coupled to a 20-ft. length of lineshaft, supported in three Hoffmann roller bearings. A 16 in. diameter pulley was fitted on the lineshaft driving a 20-in. pulley

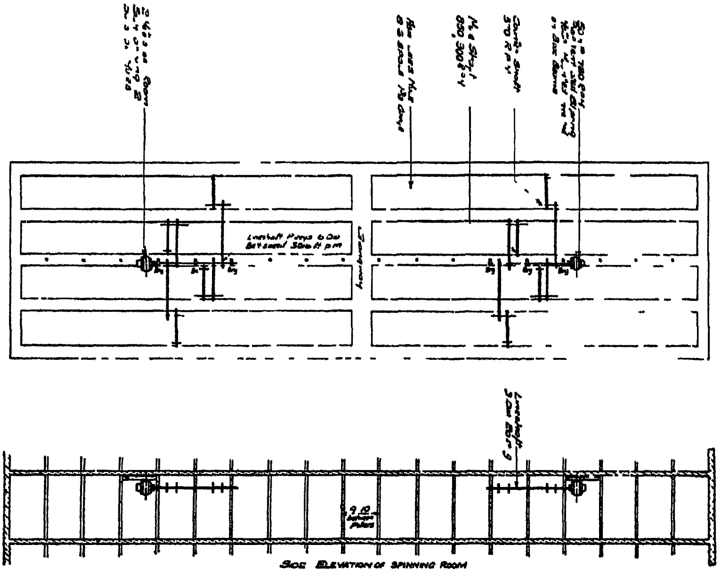


FIG 8 ARRANGEMENT OF MOTOR DRIVES TYPICAL OF EACH SPINNING ROOM (5)

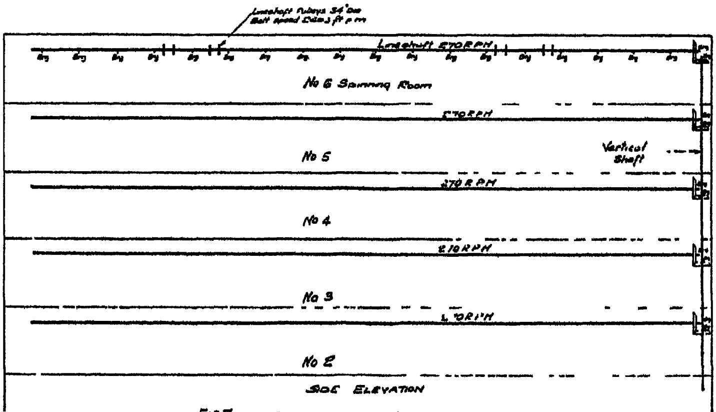


FIG 7 OLD METHOD OF DRIVING

on the mule countershaft, thus increasing the belt speed to 3,016 ft. per minute. New driving pulleys were fitted to the countershaft so as not to alter the speed of the mules.

This change-over was carried out one floor at a time, starting with the top floor, resulting in the minimum interference with the normal manufacturing operations, and when completed the production in the spinning rooms had increased 5.3 per cent. In addition the maintenance cost on the mules was reduced, due to the regularity of the drive.

The above example clearly shows that, without making any alteration whatever in the productive machines, increased production was obtained without any additional labour being employed.

There are, of course, a few mills which have changed over to electric drive where the owners claim that no increased production has been obtained, and if this is the case it has been due to the application and not the electric drive, as there are still a great many mill managers who will not agree to any change in speed of the lineshafts or alteration in pulley ratios so as to obtain better belt speeds; because they are wedded to tradition they overlook the fundamental fact that the existing lineshaft speeds were all based on the speed of the steam engine driving the mill, which in the case of beam engines ranged from 25 to 35 r.p.m. and horizontal and vertical engines up to 75 r.p.m., and to obtain a lineshaft speed of 200 to 300 r.p.m. was quite a good increase in speed, and was in line with the speeds of the machine they were driving at the time the mills were erected.

The textile machinery builders were always progressing in the design of their machines, and experience proved that higher speeds were necessary in the blowing room and spinning departments, with the result we find in the blowing room of most mills a mass of countershafts and belts, so as to get a speed of 1,000 to 1,100 on the the openers and scutching machinery, and in the ring and mule spinning rooms, lineshaft pulleys 42 ins. to 54 ins. diameter driving 10 to 12-in. pulleys on the machines.

It should be obvious to anyone that where high speeds are required on machinery the most efficient drive is the one in which the driving shaft is running at, or near, the same speed as the driven shaft, so that equal pulleys can be used, thus obtaining the maximum arc of contact of the belt and of suitable diameter to give a reasonable belt speed of 3,000 to 4,000 ft. per minute, or, better still, wherever possible, direct couple the electric motor to the machine to be driven, and this is the general tendency in all industries to employ individual motor drive to each machine. There are quite a number of cotton mills abroad completely equipped with individual motor drive which has proved highly successful.

There are many mill owners and managers who do not believe that any advantage can be gained by the individual electric drive, but one can only remind them that their forefathers ridiculed the steam locomotive and steam ships, and in their own times the progress made in road and air transport.

The fact that individual electric drive is available for all types of textile machinery makes it possible to instal additional machinery to meet changing trade conditions in rooms which would not allow for lineshaft drives or rooms far remote from the main engine, or, under conditions where the main engine is already fully loaded Where comparisons have been made in the same mill of similar machines, the machine driven by the individual electric motor has shown up better as regards production and quality of product

When a mill owner decides to modernize his driving arrangements, the following methods are available —

1 Instal turbine plant and drive all mill lineshafts by ropes

2 Instal turbine plant and generator and drive part of mill by ropes and part electrically

3 Instal turbine generating plant and drive mill by motors

4 Purchase power from a public supply and drive mill by motors

Methods 1 and 2 can only be used when the construction of the mill will allow This refers especially to existing mills, when it is necesary to replace an existing engine

Method 3 can usually be applied to any mill where space is available for the turbine plant

With either methods 1, 2 or 3 the above remarks are based on the assumption that there is an adequate supply of cooling water for the condensers, even if this be sufficient only for making up the evaporation losses met with on a cooling tower system, also there is no great difficulty in obtaining fuel and disposing of the ashes, etc

Method 4 can be applied to any mill, regardless of its shape, size or construction

The only way to make a true comparison of running costs between schemes 1 and 4, also 2 and 4, is to drive the mill in the same way For instance, in Schemel, all the mill lineshafts are driven by ropes from the main rope pulley, coupled to the gear box

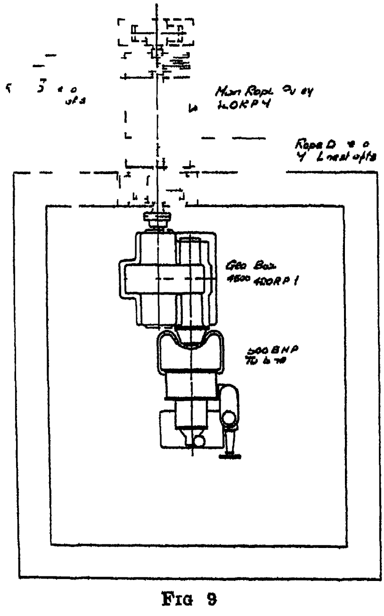


FIG 9

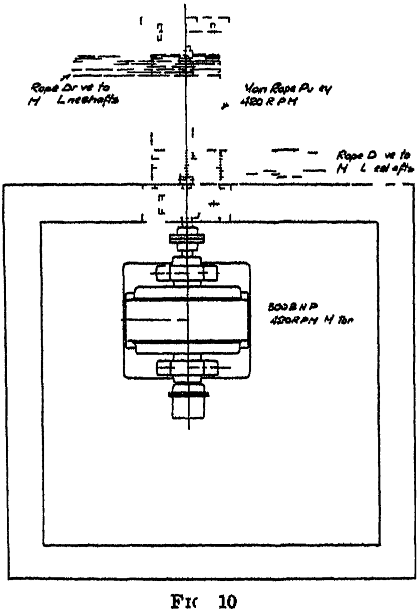
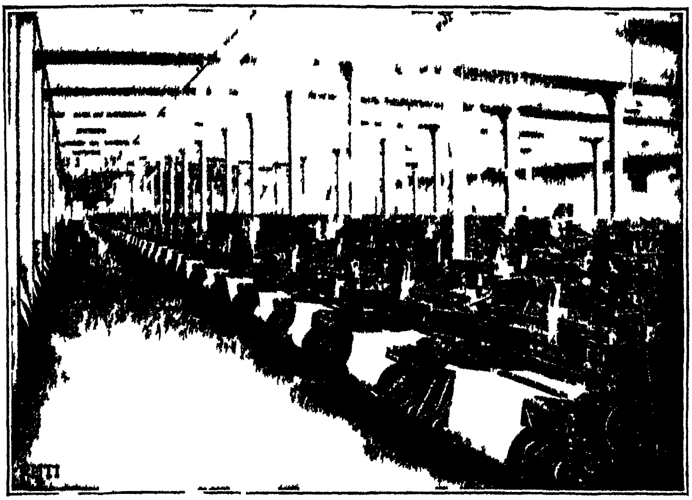


FIG 10



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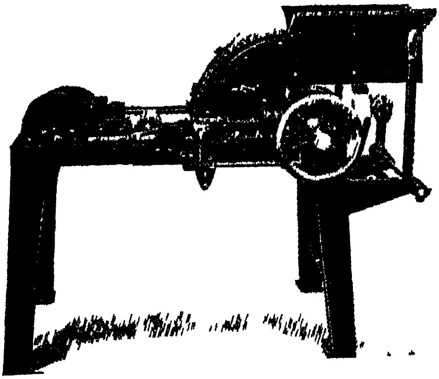

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of the turbine, as shown in Fig. 9, then the equivalent electric drive to this under scheme 4 is to simply replace the turbine and gear box by one large motor, as shown in Fig. 10, and under these conditions these two methods are strictly comparable.

There are very few mill owners who would entertain the idea of installing, say, a 1,500 brake horse-power motor for driving their mills, although it would be just as reliable in service as the steam turbine, considerably cheaper to instal, and give the same results at the productive machinery as the steam turbine.

The mill owner, when contemplating electric drive, instinctively asks for his mill to be split up into sections, each section driven by a motor, which is an acknowledgment that he considers it will give him a better drive and be more convenient to handle, and this is just what has been found to be the case in practice, with the result that the individual horse-power of the motors being installed in mills is gradually getting smaller, indicating that the mill owners who have changed over to electric drive are appreciating the value of grouping their productive machinery into smaller groups, until, eventually, individual drive will be the only type of drive employed in cotton mills.

As we are considering spinning and spinning and manufacturing mills only, there should be no hesitation in deciding on the system of drive to adopt wherever there is a public supply available at a price not exceeding 0.6d. per unit.

A great many mill owners are of the opinion that because they must have steam for heating the mill and for the tapes they might as will raise steam for power; this would be quite in order if the steam demand coincided with power demand or in cases where the whole of the power can be generated as a by-product of the process steam, but in the spinning mills under consideration the steam required for heating is not, on an average, more than 10 to 12 per cent. of the steam raised for power purposes and is chiefly required for warming the mill at nights, week-ends and holidays, and for a short time during working hours. The amount required is very variable, depending upon the seasons of the year.

In a manufacturing mill, the average heating and process steam does not exceed 15 to 20 per cent. of the total power steam; the extra steam required over the spinning mill is for the tapes, and the demand is very variable during working hours, and, in addition, in many cases it is required during the dinner hour. Therefore the question of steam for heating and process in the mill we are considering can have no bearing on the question of whether to install your own power plant or purchase power from a public supply.

A great deal has been written on this subject, and some remarkable figures have been submitted to mill owners, according to whether the scheme has been put forward by the steam engineer or electrical engineer, but it should be borne in mind that the scheme which shows the lowest running cost is not necessarily always the best one to adopt, and it is wise to remember that the scheme which requires the most capital to instal locks up capital unproductively, whereas such capital might otherwise be employed in some direct way in the mill, such as to modernize the productive machines and thereby increase output or improve the quality of the product, giving a better return on the capital invested.

To illustrate the above statement, suppose we consider a mill equipped with machinery capable of producing 2,000,000 lbs of yarn per annum and requiring 1,500 horse-power to drive the machinery

To equip this mill with steam plant capable of producing the above horse-power complete with rope race, etc , would require an expenditure of £30,000, and it should be able to earn interest at the rate of at least 5 per cent Depreciation must also be provided for, and this is usually taken as a fixed amount per annum, although it is sometimes taken as a fixed percentage on a diminishing capital value, but in this case we will assume it is a fixed amount of 5 per cent per annum

Therefore, interest and depreciation amount to 10 per cent of £30,000, that is, £3,000, and this represents a charge per lb of

$$\frac{£3,000 \times 240}{£2,000,000 \text{ lbs}} = 36\text{d}$$

This means that 36d per lb must be added to the out-of-pocket cost of cotton and spinning operations, so that the selling price may include the requisite interest and depreciation to cover the capital expenditure on the power plant

If instead of equipping the mill with its own steam plant it had been decided to go in for electric drive and purchase power from a supply company, the choice of the following methods of drive would have been available

(*a*) Single 1,500 horse-power motor drive, direct coupled to main rope pulley at a cost of £6,000

(*b*) Group motor drive on the basis of a motor for lineshaft at a cost of £11,000

(*c*) Individual motor drive for each machine at a cost of £15,000

Taking interest and depreciation on the capital expenditure as before, 10 per cent per annum, the charge per lb would be, for electric drive,

$$(a)\ \frac{600 \times 240}{2,000,000} - 022\text{d}$$

$$(b)\ \frac{1,100 \times 240}{2,000,000} \quad 132\text{d}$$

$$(c)\ \frac{1,500 \times 240}{2,000,000} \quad 18\text{d}$$

We will now compare the running costs of the steam plant and purchase power, and see what effect it has on the cost per lb

Steam-driven Mill 1,500 b h p for 2,400 hours

	£
Coal Power and Heating	2,250
Wages	500
Repairs, Maintenance, Rent, Rates, Insurance at 5½ per cent on Capital Expenditure	1,650
	£4,400

$$\text{Power cost per lb} = \frac{4,400 \times 240}{2,000,000} = \cdot528\text{d}$$

Electrical Drive

Scheme A Single 1,500 b.h.p. Motor

	£
Purchased Power 2,300,000 units per annum at 6d	5,750
Heating Coal	300
Wages	175
Repairs, Maintenance, Rent, Rates, Insurance at 3 per cent on Capital expenditure	180
	£6,405

Power cost per lb $\frac{6,405 \times 240}{2,000,000}$ 768d

Therefore from these figures the cost of power per lb weight of yarn produced is as follows

	Steam Drive per lb	Electrical Drive A per lb	B per lb	C per lb
Interest and Depreciation	36d	072d	132d	18d
Running Cost	528d	768d	855d	94d [x]
	888d	840d	987d	1·12d

[x] These figures have been increased to allow for the difference in efficiency of the large motor used in scheme A compared with the lower efficiency of the smaller motors used in schemes B and C and to cover transmission losses, etc.

The above figures are all based on coal at 18s per ton at the mill and purchased electricity at 6d per kw hour also each method of drives gives equal production. This, of course, is not correct, as either of the electrical drives B or C, if properly applied, will give increased production, with the result that as the production increases the overhead standing charges are reduced, thus reducing the total production costs.

From these figures it will be seen, although the steam plant shows the lowest running cost when capital charges are neglected, when these are taken into consideration the equivalent electric drive scheme A, using purchased power, is the cheapest.

Now the charges on capital are of the utmost importance to the successful operation of a mill, and they should be correctly proportioned on the different parts of the mill buildings, power plant, and equipment, and unless this is done it is impossible for the mill management to have any idea as to the cost of production of each process in the mill.

If these capital charges are properly taken care of when determining the cost of production and are definitely laid by in real securities or cash assets, their accumulation would provide a fund for the progressive modernization of the plant and equipment. In these modern times, where such rapid improvements are being made in textile machinery, the amount put aside each year to cover depreciation will have to be increased to cover "obsolescence," which should be a percentage based on the estimated life of a machine, in order that at the expiration of a certain period new machinery may be installed, so that the mill can keep pace with the rapid improvements and new ideas which are being developed each year.

If, now, the difference in capital expenditure between a steam-power plant and any of the electrical schemes using purchased power was to be invested inside the mill on productive machinery, it would earn more money than if invested in power plant, besides creating more valuable assets

It must be realized that a steam-power plant cannot be classed as a valuable asset, as it has been designed especially for the mill conditions and would have no practical market value if it had to be sold, whereas with the standardization of electrical supply, under the electricity department, the electrical apparatus, especially B or C, would command a higher price, especially the motor equipment supplied with scheme C, as the motors would form part of the productive machine and could be utilized anywhere. One need only follow the second-hand sales of machinery and equipment to realize the value placed on modern equipment as against the older.

When considering purchased power with either scheme B or C, especially C, and the price actually paid to the power company for the power consumed, this is really an inclusive price consisting of two items as far as the user is concerned, one for the actual cost of power to drive the mill and the other a premium on an insurance against a complete shut-down of the mill due to failure of power.

Now with a steam plant or even electrical scheme A, which is the equivalent of the steam plant, any breakdown of the steam plant on the motor in scheme A may cause a prolonged shut-down of the mill, with the consequent loss of trade

I know many mill owners will say we have never had a shut-down due to failure of the steam plant, with which I quite agree, but they still go on paying the insurance on the plant as a safeguard, but it must be realized that this insurance only usually covers for the repair or replacement of the damaged part, and not for loss of trade, whereas with purchased power and scheme B or C the possibility of a complete shut-down of sufficient length of time to interfere seriously with normal production is practically impossible with the present system of public supply.

A Circular Loom.

Our attention has been drawn to a new circular loom recently invented by an employee of the Société Colombe Loom Works, Les Fils de Guillaum Diederichs This loom is the invention of J. Jabouley, and embodies revolutionary features of construction and operation, although it weaves cloth comparable in all respects with that woven on an ordinary loom.

In the Jabouley loom the warp threads from four beams are caused to form a vertical circular tube of yarn which is rotated around its axis, and the circumference of which is equal to the width of the cloth to be produced. The shuttles or weft suppliers are stationary during weaving, and are fixed in the same horizontal plane at the periphery of the tube. Each of them inserts one pick

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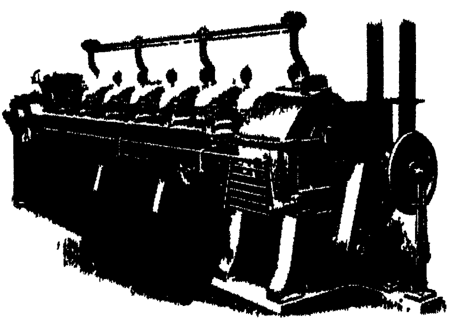

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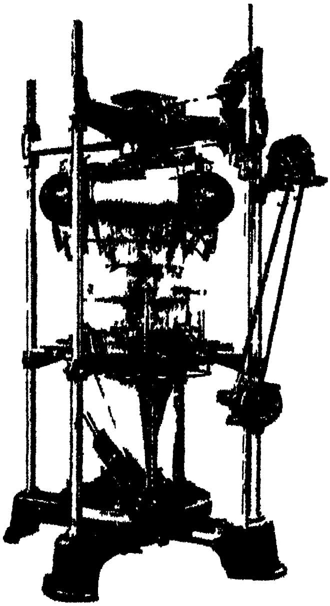
and beats up that inserted by the preceding shuttle or supplier. The cloth can be compared to the thread of a screw on which the number of grooves is equal to the number of weft suppliers. The circular loom thus inserts several picks of weft simultaneously with one circular movement. The weft is drawn along by the cloth and consequently unwound. The propelling of the shuttle is dispensed with. The fact of weaving in a tubular form enables very wide fabrics to be obtained, and providing the speed at the circumference is constant the output is proportionate to the number of weft suppliers that can be fitted.



The Jabouley Circular Loom.

The loom is automatically stopped when either a warp or a weft thread breaks or runs out.

One advantage of the new loom is that wider cloths can be woven on less floor space than in the ordinary loom. Although the loom is built rather high it is not by any means unmanageable. Another advantage is that owing to the shuttles being stationary during weaving all the troubles of shuttle projection are eliminated. The principle of the speed at which cloth can be woven has advantages over the ordinary loom, as, apart from the speed at the circumference, production is proportionate to the number of weft suppliers which can be fitted. This, of course, makes it necessary to build wide looms. For example, in a circular loom with a reed space of 72 ins. turning at 20 r.p.m. inserting six picks at a time from six weft supplies, the output would be $\frac{6 \times 20 \times 72}{36} = 240$ yards of weft inserted per minute, or 120 picks. In a circular loom of 144 ins reed space rotating at 10 r.p.m., i.e., the same speed at the circumference, inserting 12 picks at a time, the weft woven per minute would be $\frac{12 \times 10 \times 144}{36} = 480$ yards, or 120 picks.

As the weft suppliers are stationary it is possible for them to be made of such a size as will yield a larger weaving capacity. The weft never breaks, and the strain to which the warp is subjected is infinitely less than that of an ordinary loom. The yarn passes only once through the dents of the reed, and therefore the friction between the reed and the warp ends is brought to the absolute minimum. These advantages, together with the warp and weft stop motion, enable one weaver to look after several looms. It is also claimed that the overlooking of these looms is simplified, as they are mechanically efficient and the necessary precision does not create any difficulty to the overlooker.

The agents for this loom in England are: Wm. Shirley & Co. Ltd., 78, King Street, Manchester.

CHROMIUM PLATING.

According to the Chromium Corporation of America, chromium plating should find increased uses in the textile industry. The coefficient of friction of chromium is 30 per cent. lower than that of any other metal, and its ability to withstand corrosion makes it particularly adapted for the use in the finishing processes. It is cheap, does not crack or chip like porcelain.

It is easy to clean and will not tarnish. It resists oxidation to 1,350° F. These properties of chromium plate make it applicable to printing rolls, schreiner rolls, drying equipment, tensions, guides, and miscellaneous equipment. Although it may be applied to practically all base metals, chromium plate is especially effective over steel, copper, or nickel.

A thin deposit of chromium applied to the copper rollers used in the textile-printing industry will prolong the life indefinitely. It not only prevents small scratches and drags in the flat surfaces of the roll, which cause profit-killing shut downs; but it will produce a higher quality of printed goods with clearer detail, sharper lines, and cleaner blank areas.

Chrome-plated schreiner rolls will last much longer than the unplated steel rolls and will retain their high lustre. The plating provides a rust protection which is so often needed, due to the changes in temperature and the carelessness of operatives who put their perspiring hands on the rolls, leaving corroded imprints. Due to the hardness of the coating it will preserve the lines and aid in imparting a high lustre to the cloth.

NEW HIGH-SPEED WARPER.

The Draper Corporation Hopedale, Mass., U.S.A., announce the placing on the market of a new high-speed warper designed and built to run at any rate that speed yarn and creel conditions will allow. The company claims that this new model even at great speed is almost vibrationless and noiseless. The machine will take beams up to 28 inches in diameter, may be used with any modern creel designed for high-speed warping, and it stops quickly and easily because its high power brakes match its brake speed. They also state that it has a beam doffer easily operated, regulated by screws with triple threads that save one-third of the time and labour of doffing, and that it has a sliding bar stop-motion of the loom type with patent device to open the warps where an end is down.

MERCERIZING COTTON ROVING.

Mercerizing of cotton in the form of roving is said to be made possible by a process and machine announced recently by Hygrolit, Inc., 576, Davis Avenue, Kearny, N.J. The cotton is treated with a special mercerizing solution in the form in which it leaves the slubber or intermediate frames.

Roving on the slubbers is wound on perforated tubes constructed of rust-proof steel which are put over common flyer bobbins made of wood or hard-pressed paper. The roving is then wound on in the usual manner. The perforated tubes holding the roving are removed from the bobbins and placed in a special apparatus containing the mercerizing liquor. This solution causes shrinking of the cotton fibre. Natural tension is afforded by the wound form of the roving; and mechanical tension devices, such as are needed for mercerizing skeins, are unnecessary. Washing and drying of the roving is carried out while it is still on the tubes. The tubes are replaced on the flyer bobbins and the spinning operations are continued. The mercerized yarn, in spinning, can be brought immediately into any kind of package that the mill may desire, such as bobbins, cops, cones, or beams.

The manufacturers state that the Hygrolit method is especially important for treating cotton that is to be used in the manufacture of plush, knitting yarns, and mixed fabrics containing rayon, and also for installation in spinning mills desiring to install small mercerizing units. Eliminating the necessity of winding the yarn on skeins is said to reduce the cost of mercerizing.

MORE LOOMS PER WEAVER.

The Burnley experiment of eight looms per weaver has been valuable as showing not only the saving effected as compared with the usual system of four looms to the weaver, but a comparison can now be made of what the automatic can save as compared with the other two systems. Production costs of the three systems have been carefully prepared, and we are now able to publish them.

The Burnley printer trade is eminently suitable for experiments of the "more looms per weaver" type, whether they be ordinary looms or automatics. The comparison is made on a Burnley printer 56 ins. by 91¼ yds., 72 by 76, using 38's twist and 38's weft. The cost of the ordinary loom is placed at £14, producing 182 yards per week, while the automatic (Northrop) cost is £55, with a production of 175 yards per week with 24 looms to the weaver. The parallel costs for a cut of 91¼ yards long for the three systems are as follows:—

	Four-loom system. Pence.		Eight-loom system. Pence.		Northrop Pence.
38's Beam at 17¼d.+¾d. lb. for size 7.67 lbs. at 18d.		138.06		138.06	138.06
2/50 Cheese=0.164 lbs. at 30d.		4.92		4.92	4.92
* 38's Weft=8.64 lbs. at 15d.		129.60		126.00	124.20
Weaver's wage	59.50		43.00		70.16
Expenses	35.58		38.30		
		95.08		81.30	
		367.66		350.28	337.34
Regain from sale of waste at 6d. lb.= five per cent. of 8.46= .43 lbs.		2.58		—	—
Regain from sale of waste 2½ per cent. of 8.4 lbs. = 21 lbs. at 6d.		—		1.26	—
Regain from sale of waste, one per cent. of 8.28 lbs.=082 lbs. at 6d.		—		—	.49
Net cost of cloth		365.08d.		349.02d.	336.85d

* In the case of the eight-loom system, 2½ per cent. saving is due to using bastard cops, while on the automatic system one per cent. waste is the guaranteed allowance by the Northrop Company. (*Textile Weekly.*)

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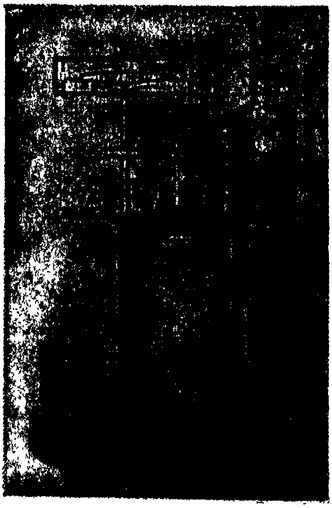

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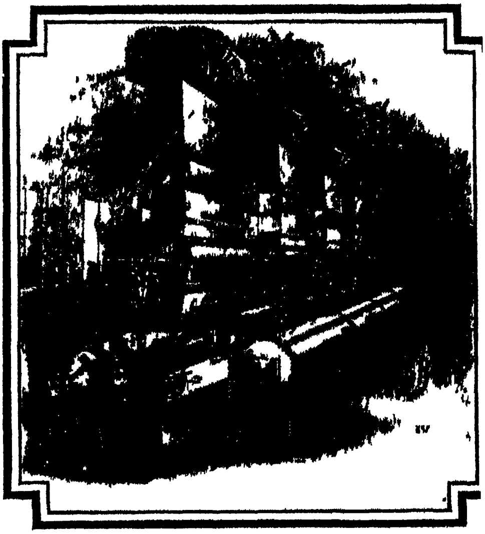

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Result of the British Government's Enquiry into the Cotton Industry of Lancashire.

Early in July a report was published by the British Government on this subject It will be remembered that the Government appointed some 12 months ago a Commission to investigate the causes of the depression of the cotton industry in Lancashire and to suggest remedies The taking of the evidence extended over six months, experts from the various organizations of masters and operatives interested directly in and allied with the cotton industry submitted written and verbal evidence, and in this way a mass of material has been collected, but as it contained information of a confidential nature the whole of the evidence has not been published. The Report (Cmd., 3,615, 6d. net, may be purchased from H. M. Stationery Office, Adastral House, Kingsway, London, W.C.2) contains some 28 pages, and we extract from it the following conclusions and recommendations.

CONCLUSIONS.

(1) Since before the war the world consumption of cotton piece goods appears to have risen, but the yardage of such goods exported from Great Britain is now less than two-thirds of what it was in 1910-13.

(2) By far the most serious losses of trade are those in the export of coarse standard lines of cotton piece goods. The information available from the trade returns does not enable precise figures to be given for these lines of goods. It may be noted, however, that the exports of grey unbleached piece goods, which in 1913 amounted to 2,357,402 thousand linear yards, had fallen by 1924 to 1,402,275 thousand linear yards. Since that date there has been a progressive decline, exports in 1929 falling as low as 954,823 thousand linear yards. The exports of prints also have fallen from 1,230,754 thousand linear yards in 1913 to 551,706 thousand linear yards last year.

(3) Losses in the export trade have not been confined to the coarse standard lines, and there are increasing indications that competition is becoming keener in all classes of cotton piece goods, including the finer and more varied lines.

(4) The markets in which Lancashire has suffered the most

serious losses are those in the Far East, particularly India, China and Japan.

As regards India, the large falling-off of cotton goods exported from Lancashire is, in the main, due to an increase in the production of cotton goods in India, but also partly to Japanese competition.

Outside India, the most formidable competition is from Japan. The Japanese cotton industry has grown sufficiently powerful not only to supply its home market, but also to develop a formidable export business, largely at the expense of Lancashire. Japanese cotton goods are at present mainly exported to the Eastern markets, but the Japanese are extending their export trade to more distant countries, e g., to East Africa.

(5) Until far-reaching improvements are introduced into the British industry, there is no likelihood that Lancashire will be able to arrest the decline in her export trade, still less that she will recover the trade which she has lost.

(6) The organization of the Lancashire cotton industry, with the exception of the finishing section, is substantially the same as that which existed in the nineteenth century, but her successful foreign rivals in the world trade have adopted a very different method of organization. Their system is based on the establishment of the closest relations between production and marketing.

(7) The marketing of Lancashire piece goods is at present conducted almost exclusively on the basis of the acceptance of orders that are individually profitable to the merchant concerned without regard to the needs of production or to the economies that may be achieved in standard goods by mass production and long runs.

(8) To enable the manufacture of standard goods once more to be energetically developed, Lancashire requires a marketing system so organized as to secure a steady outlet for goods produced by the most economic methods.

(9) The cost of production of cotton goods in Lancashire is substantially higher than that in the countries which offer her the most serious competition. If that competition is to be met, it is essential that the employers and operatives in all sections of the industry should reduce costs and increase efficiency by concerted action.

(10) There are three possible ways by which these two purposes may be approached, namely, (*a*) the technical improvement of the spinning and manufacturing sections, involving considerable re-equipment; (*b*) the formation of larger units within each section of the industry; (*c*) the extension of co-operative effort on the lines initiated by the Joint Committee of Cotton Trade Organizations. These methods are interrelated, and it is not to be expected that any one of them by itself could be effective.

(11) In the preceding conclusions we have endeavoured to state the various remedies that it is open to Lancashire herself to apply to her present troubles. There is no alternative method of recovery. The system which brought prosperity to the cotton industry is to-day manifestly inadequate to meet the strain of modern conditions. A new world has emerged from the chaos created by the war, and the great losses that Lancashire has since suffered are in

large part due to an attempt to conduct its industry on pre-war lines and to a refusal to recognize that the old conditions, so favourable to Lancashire, have passed away for ever. Recent years of adversity have, however, given some proof that the leaders of Lancashire realize the gravity of the situation and the need for new methods to cope with it. The necessary measures for re-organization are known and the finance required is available.

The well-being of the cotton industry is more than the concern of Lancashire herself. It is of vital interest to the country as a whole. No nation could tolerate the neglect of hopeful means of recovery when confronted with the decline of so important an export industry, with the burden of hardship and misery which such a decline must mean to the workers whose employment is destroyed. The crisis is urgent and immediate action is imperative. We are confident that the organized operatives and employers of Lancashire will embark forthwith upon the serious consideration of the measures essential to the recovery of their trade. If, however, this hope is disappointed, or if any section proves recalcitrant, we think it right to place on record our considered view that it would be the duty of His Majesty's Government themselves to consider inviting Parliament to confer upon them any necessary powers.

RECOMMENDATIONS.

In the light of the foregoing conclusions, we recommend that His Majesty's Government should take every step in their power to urge on the employers and operatives in Lancashire the importance of considering the following possible means of reducing the costs of production and recovering the lost export trade in cotton goods. They are methods which have proved of economic value to Lancashire's successful rivals, and they are of sufficient importance to justify the most careful consideration. In most cases their application could only be gradual, and would require at every stage the closest and most cordial co-operation between the employers and operatives of Lancashire

(1) *Possible Methods of Technical Improvement.* For the manufacture of cheap standard lines in which British goods have been so largely ousted from the Eastern markets, extensive use has been made of the short-stapled Indian cotton. This has hitherto been but little used in Lancashire, where the longer-stapled but more expensive American cotton has been almost exclusively preferred. In this way her competitors, some of whom have acquired great skill in the mixing of Indian and other cottons with American cotton, have secured an initial advantage over Lancashire by using a cheaper cotton for their manufactures.

(2) Other countries use ring spindles to a much greater extent than Lancashire, and this method of spinning is of especial importance where Indian and other short-stapled cotton is to be used. The use of such cotton might also require a readjustment of the balance between cardroom and spinning machinery. High-draft spinning machinery and high-speed winding machinery have also been found to offer the possibility of valuable economies.

(3) In the manufacturing section the most important development abroad has been the introduction of automatic and semi-

automatic looms for the weaving of standard cloths. These do not, as a rule, give a greater output per loom, but each weaver can mind a very much larger number of looms than in the case of the ordinary power loom as used in Lancashire. In this way, an important saving in wage costs is possible concurrently with an improvement in the remuneration of the individual weaver.

(4) The initial cost of automatic looms, and, to a less extent, of automatic attachments to ordinary looms, is high, and we received important evidence that automatic looms could not be worked economically on a single shift per day.

(5) *Amalgamation.* The formation of larger units in the spinning and manufacturing sections of the industry would serve three great purposes: (*a*) They would permit full advantage to be taken of any possibilities of technical improvement and would secure economies in production costs; (*b*) they would enable a common policy to be formulated and carried into effect within each of these sections; (*c*) they would provide a firm basis for such a measure of co-ordination between those engaged in the various processes of production and marketing as will enable Lancashire once more to take the initiative in the markets of the world These units should be strong enough to formulate a definite production policy and to enter into arrangements with one another and with the other sections of the industry, including the merchants and the finishers, for a forward policy. The finishers are already combined to a substantial extent, and the formation of strong and well-balanced amalgamation among the merchants also deserves careful consideration.

(6) Considerable sums of fresh capital may be required in connection with amalgamations for such purposes as re-conditioning and re-equipping mills and for development. We are assured that, for any comprehensive and satisfactory rationalization scheme having for its object the reduction of production costs and improved marketing, the necessary finance will be forthcoming.

(7) *Development of Co-operative Effort throughout the Industry.* Valuable service is being rendered to the cotton industry by the Joint Committee of Cotton Trade Organizations. The experiments that are being set on foot under the auspices of the Committee in co-operative production and systematic marketing of standard lines of goods should provide a practical testing ground of the possibilities of solving what we regard as the central problem of the industry. More generally, the Committee can do valuable work in various directions, in economic investigation and its co-ordination with technical research and in the practical application of both, in the interchange of ideas and information between the various sections of the industry, in organized propaganda and the finding of new uses for cotton. The Joint Committee affords an opportunity for the development of a centre of information and study, a common mind, a concerted policy, for the industry as a whole.

(8) The changed conditions abroad, particularly in the Far East, have vitally affected the position at home. We believe that advantage might accrue from an examination of these conditions on the spot by the representatives of the British industry. In the event

of the industry deciding to send out a mission or missions for this purpose, we recommend that His Majesty's Government should do all in their power to facilitate and assist their work.

It will be seen that this Report contains really only one new point, and that is "*the inference that the trade unions should be prepared to work double shifts in case of automatic looms, and generally adapt themselves to the changed conditions of the industry.*" Such recommendation, coming from the representatives of a Labour Government, should certainly be of value.

The International Federation may claim that its reports on mass production in U.S. (1928), on Japan and China (1929) and India (1930) contain a good deal, if not all, of the facts dealt with in this Report.

The textile trade unions' attitude towards the recommendations of this report is best illustrated by the action of one of them giving notice that the eight-loom experiment must stop immediately at one of the mills where arrangements for its extension were said to be in preparation.

Cotton Mill Conditions in the South of U.S.A.

We extract the following from a report compiled recently by Robert C. Dexter, Ph.D., Secretary of the Department of Social Relations of the American Unitarian Association:—

Background.

The labour supply in practically all the textile mills is drawn from two classes of people, the tenant farmer in the Piedmont area and the mountaineer from the foothills of the Appalachians. At the very outset it is only fair to say that probably, with a few exceptions, the condition of the workers in the mills to-day is infinitely better than that of their "kinfolk," to use a Southern term, who still remain on the farms, and especially those who are living in the mountains. Conditions among the tenant farmers are appalling. A recent study by the Federal Government showed that the average cash income in three counties of South Carolina was less than $300 a year. Of course the farmer raised a good deal of his produce and he had his home, such as it was, but his standard of living was low and educational facilities were very meagre. To an even greater extent this is true of the mountaineer. Up to a few years ago there were practically no educational facilities in the mountain "coves" and the housing conditions are even yet exceedingly primitive. These families lived and still live an isolated life. One of the mill managers with whom I talked said that one of his first tasks is to get his new employees to learn to co-operate. They did not even know how to play baseball or any game which involves team work. Many of these mountain homes have no windows and a dirt floor, and the sanitary conditions are unspeakable. They are almost illiterate, and when they can read and write their familiarity with books is practically limited to the Bible.

When these tenant farmers and mountaineers came to the mill they immediately plunged into a different world. They have had to learn to live together and work together, and most of the mill owners, although not all, have provided them with education and recreational facilities; and the housing even in the worst of the mill villages is infinitely better than that to which they have been accustomed. In fact, it is to a very large extent due to the elevating influence of the mill educationally and otherwise that a great deal of the present trouble can be traced. While by no means all of the present mill workers are of the second generation, many of them are. They have had the advantage of the schools, in many cases provided by the mills, not by the community; they have learned something of the outside world and the standards of living which other people maintain, and consequently many of them are no longer satisfied with the conditions in which they are living in the mill villages.

It is perhaps necessary to say a word about the mill villages. Most of the mills originally located themselves in the country and it was necessary to provide housing as well as manufacturing plant. These houses and community facilities such as roads and schools were in most cases built by the mill and a great majority of the mills in the South still provide housing. It was also necessary for them to provide recreational facilities, build roads, install sewerage and do many things which in the North are provided by the community. Many of the mills also found it necessary to provide company stores, although this practice is becoming less frequent, as a company store very rarely yielded a profit and was the source of constant misunderstanding. In addition, many, if not most, of the mills which I visited were responsible for the building of churches in the communities, and still supplement the salaries of the minister as well as of the school teachers. This really means that in many places the mill children get more schooling and better schooling than is the case in the county schools and even in some of the larger towns. In fact, the best school system which I saw in the South, and one of the most progressive I have seen anywhere, was in a mill section adjoining Greenville, S.C.

The mill villages differ among themselves just as the mills do. Some which I visited have really beautiful homes for their operatives, with paved streets, sewerage and good community buildings. Others have miserable houses, unpaved mud holes for streets, no sewerage facilities and very inadequate community buildings. All of them without exception have a very low rental. Rents for mill houses run from $1.00 to $2.00 per week for four rooms, including water and electricity. Where bathrooms are installed, and they are more and more being installed in newer villages, the rental is somewhat higher. This fact must be taken into account in any comparison of wages South and North.

There is no question that the control of the mill village is very largely in the hands of the employer.

Attitude of the Workers.

A word must be said here in regard to communist propaganda. The strike in Gastonia, as everyone knows, was a communist movement, but it is my impression not only that that strike is dead but that there is no future for communism in the South.

Wages and Hours.

There is no question that actual cash wages are lower in the South than in the North. There is probably a cash differential of from $4.00 to $5.00 a week between the textile worker in the south-eastern states and in New England. I have not yet had a chance to check up on this statistically, as I hope to do later. At the same time, it should be borne in mind that rents are very much lower and almost certainly there is an added advantage which the Southern worker has in respect to cost of fuel and clothing. Real wages, therefore, counted in terms of what money will buy, are probably not as different between North and South as is supposed, although even here there is probably a differential. It must also be borne in mind that the Southern worker, not being as highly skilled as his Northern brother, cannot turn out as much product, but that condition is fast being improved by education and better technical facilities within the mill. While wages might and probably can be utimately increased somewhat, I should doubt if they ever need to be equal even if the standard of living is as high as that in the Northern mills. This is particularly the case so long as the mill village system continues.

In regard to hours, the situation is clearer. North Carolina at present allows sixty hours work in the mill per week. South Carolina fifty-five. In Massachusetts it is forty-eight hours for women and minors, and, of course, that determines the hours in which the mill itself is run. Many of the mills in the South run day and night. In many of the mills of North Carolina

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women and also children over fourteen are employed all through the night. It should be said in fairness, however, that many of the best mills run only fifty four or fifty five hours, and some of them have either no night shifts, except in cases of emergency, or do not use women and children in their night shifts. These standards, which are voluntarily adopted by the better mills, should, in my judgment, become part of the state legislation throughout the South. As a matter of fact, I am informed that North Carolina is at present considering legislation further reducing the hours of labour and there is a considerable prospect that it will be passed at the next session of the legislature.

Night work is also one of the very real problems. One of the leading owners of the mills in the South has recently announced that it is his judgment that night work must ultimately be abandoned. The reasons are twofold: first, overproduction in the industry and, second, the humanitarian point of view. I found that this statement was accepted by a number of the manufacturers with whom I talked. The difficulty is to get *all* of them to agree to eliminate night work, and a second and even greater difficulty is to provide labour for those who are now engaged on the night shifts. It would be worse than folly to abandon night work at once, because thousands of men and women would be thrown out of employment, and hundreds of thousands of people would be destitute. The abandonment of night work ought to come gradually. One of the mills which I did not visit but which I heard about has announced that it is cutting down its night work two hours a night and has announced the date by which it hopes to eliminate night work entirely, some months or a year ahead. It is the hope of the management of this mill that its workers, knowing ahead of time, will be able to get into some other industry.

Just how many children are employed in the mills no one knows. The North Carolina law allows any child over fourteen years who has finished the fourth grade in school to enter the mill. In South Carolina a child between fourteen and sixteen must get a special permit, which involves considerable difficulty. A movement is at present under way headed by the League of Women Voters in North Carolina to raise the standard from the fourth grade to the sixth grade, which will eliminate a number of the child workers.

POLAND'S WORKING HOURS.

The Polish Spinners' Association, known as *Zrzeszenie Producentow Przedzy Bawelnianej w Polsce*, 9 Moniuszki, Lodz, has again taken up its activities. We learn that there are now about 96 per cent of the Polish spinning mills affiliated, and that the statistics which have been established show that the output of 100 per cent of the mills in *one single* shift of 46 hours per week is just about the limit which the requirements of the country can take up under normal conditions. There are, of course, periods of a critical nature, such as the one through which we are passing at the present time, when perhaps 87 per cent of production is all which the Polish market can consume.

The fact that a large number of firms was able to run two shifts and even three shifts was a great drawback to the industry, as these firms were able to produce cheaper, and consequently they were in a position to undermine the market. Up to spring, 1929, the three-shift system was possible in Poland, provided the Government gave permission, but since the middle of October, 1929, the three-shift system has ceased to exist, by Government orders, and consequently only the two-shift system is possible. The report to hand states: "*We have found that the two-shift or three-shift system* *is really the cause of the catastrophical depression of the industry, and, therefore, our organization has decided to allow, as a rule, only one shift, the exception being if a real yarn famine exists in the country."*

Poland's one shift does not consist of 48 hours, but only of 46 hours per week, and we have to pay two weeks' holiday to the workpeople. This means a further reduction of about one hour per week; consequently our 100 per cent. working hours correspond only to 94 per cent. of the normal working hours in other countries.

RUSSIAN COTTON INDUSTRY.

Development of the Textile Industry.

The Bank for Russian Trade "Review" for February, 1930, gives preliminary figures of the output of certain textile goods in 1928-29, as compared with the output of the preceding year. The output of finished cotton goods amounted to 2,952 million metres, an increase of 15 per cent. on the 1927-28 output. The output of cotton yarn was 350,000 tons, or a gain of 12 per cent. on the previous year.

Though output increased there was a certain deterioration in quality, which is attributed to the fact that the mills had not fully adapted themselves to the different technical and organizational changes recently introduced. The changes included variations in the kinds of raw materials used, the introduction of three shifts, and the emphasis laid on the necessity to reduce costs and increase output. Measures have now been taken to improve the quality of the goods produced while maintaining the lower costs and the increased rate of output.

The sale of practically the whole output of the textile trusts is now organized by the Textile Syndicate. In 1928-29 the sale of textiles by the Syndicate amounted to 2,245.3 million roubles (approximately £224,530,000), as compared with 1,924,400,000 roubles in 1927-28. A particularly large increase was registered in the sales to the rural population. While the sale of textile goods and ready-made clothing increased in the cities by only 3.7 per cent., the increase in the villages was 37.9 per cent., the increase being greatest in areas possessing a surplus of marketable grain. The purchase of ready-made clothing was a new feature, as in the past the peasants made their own clothing.

Mr. Saul G. Bron, head of the Soviet Trade Delegation in Great Britain, in a recent address before the Manchester Chamber of Commerce, discussed the cotton textile industry in Russia. We extract from his lecture the following:—

"Demand for textiles considerably exceeds the supply in Russia. The standard of clothing in the past was very low indeed, only about 11 metres per head. This has now been increased to an average of 16 metres per person. The population is increasing at the rate of about four million a year and it is essential to expand their textile industry. Before the war Russia did a considerable export trade in cotton goods to Persia and Afghanistan," which the lecturer admitted Russia has regained.

"The Soviet Government is planning the erection of 56 mills, with 2,472,500 spindles and 68,004 looms, in the central industrial area around Moscow. There is much activity, too, at Iwanowo-Wosnessensk, 'the new Lodz of Russia,' which employs about 35,000 textile workers at the present time."

AMALGAMATION OF COTTON MILLS IN GERMANY.

As in England, so in Germany, amalgamation is considered one of the most necessary steps in order to bring the industry again on a sounder basis. Two of the largest firms, the F. H. Hammerson A.G., Osnabrück, and the Christian Dierig A.G., Langenbielau, which for years were considered very serious competitors, are reported to have reached a ten-years working agreement, according to which their shares will be deposited with a holding compay. These are two concerns of high financial position, and it is hoped that in consequence of this amalgamation a great deal of unnecessary price cutting will be avoided. Dierigs specialize in finishing and weaving, whilst Hammersons are mainly spinners, though they have also looms; the two concerns are said to represent about seven per cent. of German's cotton industry, and therefore the new combine cannot be regarded as unwieldy.

U.S.A. COTTON INDUSTRY AND SHORTER HOURS.

The "Index" for June published by the New York Trust Co. recently contained an instructive article on the Cotton Industry in U.S.A. from which we extract the following:

The programme which is being sponsored at present by leading manufacturers and the Cotton Textile Institute was developed in several conferences within the industry and with Government officials. The plans proposed attack the problems of the industry from both ends. They contemplate maximum hours of operation and an organized and comprehensive effort to extend present markets for cotton goods of all kinds and develop new outlets, both in domestic and foreign markets.

The reduction in hours for labour and machinery is to be effected according to a schedule of not more than 55 hours per week for the day shift and 50 hours per week for the night shift, including all overtime.

Since this recommendation was announced in February, with the approval of twenty-four important representatives of the industry, it has received acceptance, with some exceptions, all along the line. At the present time mill executives in the Southern states and in New England, representing about 23,000,000 spindles, have endorsed the recommendation. These represent 73 per cent of the spindles in going cotton mills in the United States, manufacturing both cotton fabric and yarn. The proposal has been put into effect by at least 80 per cent of the manufacturers of print cloth, narrow and wide sheetings, carded yarn, fine goods and towelling.

While doubts, based largely on past history of movements of this kind, have been voiced as to the permanence of co-operation along the above lines, we understand on the other hand, that not only the Cotton Textile Institute but also several manufacturers recommend further reduction of hours, which proposal they believe will find favour as soon as the value of the present plan has become manifest. Another suggestion sponsors mergers as a method to increase efficiency.

In view of the fact, already referred to, that a relatively low rate of overproduction exercises such an important influence on the markets the programme promoted at present appears to be to the point. The cotton textile industry has, indeed, often reduced its operations only under the severest strain of overproduction, expanding again after a few months upon the slightest revival of business. But the increasing knowledge of the industry about its own affairs and governing conditions would seem to make possible a maintenance of the present seriousness of purpose.

FINLAND.

COTTON INDUSTRY PLANS CARTEL

Advices to hand state that the heads of various cotton mills of Finland have agreed to co-operate in order to meet the competition of foreign manufactured cotton goods. This step is believed necessary due to the reported depression in the local cotton industry.

ITALY.

It is reported in the press that four large Italian mills are forming a consortium for the purchase of raw cotton and the sale of the finished product. The firms concerned are Cotonificio Veneziano, Cotonificio Crespi, and Manufature Toscane Riunite. Cotonificio Veneziano acquired control of the Cotonificio Triestino recently in liquidation proceedings.

THE TEXTILE EXPORT ASSOCIATION OF U.S.A.

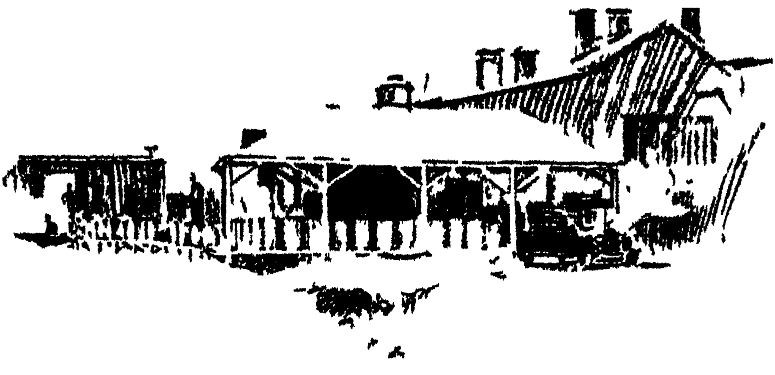
Representatives of 17 important cotton manufacturing firms in U.S.A. met and endorsed the idea of the formation of an Export Association. A further meeting is to be called on July 15.

This project has been under consideration for several months by committees representing The Cotton Textile Institute and The Association of Cotton Textile Merchants of New York. These committees finally placed before the meeting this week a definite recommendation that an Export Association be formed under the provision of the Webb-Pomerene Act and that this Association be the medium of furthering co-operation among exporters of cotton textiles with respect to uniform terms of payment and other matters which might properly be the subject of group action to increase export business in American cotton goods.

A proposed constitution for the Association was presented at the meeting for the consideration of prospective members, and those present voted unanimously to hold another meeting on July 15 for the purpose of forming the Association.

The following firms were represented at this meeting: Amory, Browne & Co., Joshua L. Baily & Co., William L. Barrell Co. of N.Y., Inc., Bliss, Fabyan & Co., Inc., M. C. D. Borden & Sons, Inc., Brune, Pottberg & Co., Garner & Co., Hunter Mfg. & Commission Co., Iselin-Jefferson Co., Minot, Hooper & Co., Neuss, Hesslein & Co., Pacific Mills, Pepperell Mfg. Co., Prince Lauten & Co., Tilton & Keeler, Inc., Turner, Halsey Co., and Wellington, Sears & Co.

Other exporters of cotton textiles will be invited to join the proposed Association.



MISCELLANEOUS

New U.S. Tariff on Cotton Goods.

On June 13 the tariff bill passed the U.S. Senate and came into force on June 18.

We give below the tariffs on cotton manufactures, under the new rate as compared with the previous one in force.

One important textile item appears under agricultural products. This is cotton of 1⅛ in. staple or longer, which is dutiable under the new law at 7 cents per pound. Under the old law this was on the free list.

Schedule 9—COTTON MANUFACTURES.

Commodity		1922 Law	New Rate	
Cotton yarn: Unbleached singles—				
To No. 90, lb.	10% to 25%	5% + 3-10%		*
Above 90, lb.		25%	32%	
Bleached, dyed, coloured, combed or plied	10½% to 30%	10% + 3 10%		
Above 90, lb.		30%	30%	
Coloured with vat dyes				
Up to 90, lb	19% to 34%	10% + 1-10%		*
Above 90, lb	19% to 34%	37½% + 1-10%		*
Cotton waste, manufactured, lb		5%	5%	*
Cotton sewing thread:				
Per 100 yd.		½c	½c	
Not less than 100 yd.		20%	20%	
Not more than 100 yd		35%	35%	
Crochet, embroidery, darning and knitting cottons:				
Per 100 yd.		½c	½c	
Not less than 100 yd.		20%	20%	
Not more than 100 yd		35%	35%	
Countable cotton cloth: Unbleached				
Up to No. 90, lb.	1·05 to 1·30%*	10% + 35 100%		*
Above No. 90, lb	30%*	41½% + 35 100%		*
		Not less than 55-100% per no. per lb.		
Bleached—				
Up to No. 90, lb.	13% + ¼%	13% + 35 100%		
Above No. 90, lb.	33% + ¼%	14½% + 35 100%		
Printed, dyed, coloured or woven figured:				
Up to No. 90, lb.	15% + 31¼%*	16% + 35 100%		*
Above No. 90, lb.	45% + 31¼%*	17½% + 35-100%		*
Coloured with vat dyes				
Up to No. 90, lb.	Up to 44%	16% + 35-100%		*
Above No. 90, lb.	44%	47½% + 35-100%		*
Woven with eight or more harnesses or with jacquard, lappet or swivel attachments—				
Up to No. 90, lb.	Up to 45%	Above duties + 10%		*
Above No. 90, lb.	45%	Above duties + 10%		*
Woven with two or more colours or kinds of filling—				
Up to No. 90, lb.	Up to 45%	Above duties + 5%		*
Above No. 90, lb.	45%	Above duties + 5%		*

* for each additional number

Commodity	1922 Law	New Rate
Countable cotton cloth, containing silk or rayon .		
Printed, dyed, coloured or woven figured		
Up to No 90, lb . .	Up to 45%	
Above No 90, lb	45%	
Cloth, in chief value of cotton, containing wool		
Fine fabric . . .		25%
Special cloths, filled, coated or waterproofed		
Tracing cloth, sq yd	5c + 20%	30%
Window hollands, sq yd.	3c + 20%	30%
Oilcloth, except for floors, sq yd .	3c + 20%	30%
Filled or coated cotton cloths, n s p f sq yd	3c + 20%	35%
Rubber and other waterproof cloths .. .	5c + 30%	40%
Tapestries and other jacquard figured upholstery	45%	55%
Cotton pile fabrics .		
Velvets and velveteens	50%	62½%
Manufactures of pile fabrics plush and velvet ..	50%	62½%
Other pile fabrics, corduroys and plushes	50%	50%
Terry-woven fabrics	40%	40%
Cotton table damask .. .	30%	30%
Manufactures of .	30%	30%
Household articles of cotton		
Quilts		
Jacquard figured .. .	25%	40%
Not jacquard figured	25%	25%
Blankets		
Jacquard-figured	45%	45%
Not jacquard figured . . .	30%, not less than 14½c lb	
Jacquard-woven napped cloths . .	45%	45%
Towels		
Not jacquard figured . . .	25%	25%
Jacquard-figured	40%	40%
Sheets and pillow cases	25%	25%
Mop cloths, dust and polishing cloths . ..	25%	25%
Table and bureau covers, etc , n s.p.f.	30%	30%
Cotton, smallwares		
Smallwares, n s p f.	35%	35%
Lamp, stove wicking and spindle banding, lb ..	10c + 12½%	30%
Candle wicking, lb.	--	10c + 12½%
Lacings, boots, shoe and corsets, lb .. .	15c + 20c	30%
Loom harness, healds	25c + 25%	35%
Labels for articles	50%	50%
Belting and rope, for machinery, lb	30%	30% 40%
Knit fabrics in the piece .		
Made on warp knitting machines, lb . ..	55%	45%
Other, lb	35%	35%
Cotton gloves of fabric knit on other than warp knitting machines, doz	50%	50%
Of woven fabric	25%	25%
Of fabric knit on a warp knitting machine ..	50%	60%
Hosiery made by knitting machines	50%	50%
Made or cut from knitted fabrics, n s.p f. ..	30%	30%
Wearing apparel, knit, n s p.f.	45%	45%
Handkerchiefs and mufflers :		
Not hemmed	40%	Same as cloth
Hemmed	40%	Same as cloth +10%
Clothing and wearing apparel, not knit :		
Men's shirts	35%	45%
Collars and cuffs, doz.	30c + 10%	30c + 10%
Corsets and brassieres	35%	37½%
Other	35%	37½%
Nottingham lace-curtain machine products	60%	60%

* for each additional number

Commodity	1922 Law	New Rate
Floor coverings of cotton :		
Rag rugs, hit-and-miss	35%	75%
Chenille rugs	—	40%
Other carpets, carpeting, mats and rugs of cotton	35%	35%
Cotton wiping rags, lb	Free	3c
Manufactures of cotton, n s p f	40%	40%
Articles containing cotton of staple 1⅛ in or more subject to additional duty		+ 10c lb.

Schedule 13—MANUFACTURES OF RAYON OR OTHER SYNTHETIC TEXTILES.

Rayon yarn :		
Singles—		
Weight 150 deniers or more, lb	45c—45%	40%
Less than 150 deniers, lb ..	45c—45%	50%
		(40c per lb. minimum)
Two or more yarns twisted together		
150 deniers or more, lb	50c - 45%	50%
Less than 150 deniers, lb	50c —45%	55%
		(45c per lb minimum)
Rayon waste (except acetate)	10%	10%
Staple fibre (cut rayon filaments other than waste) lb.	20%	25%
Noils		25%
Carded rayon		10c + 25%
Sliver and tops		10c + 30%
Spun rayon yarn .		
Singles, lb.	25c 45%	12½c + 45%
Two or more yarns twisted together, lb.	30c 45%	12½c + 50%
Rayon yarn—put up for handwork and rayon sewing thread	50c 45%	55%
		(45c per lb. minimum)
Rayon in bands or strips (visca and cellophane suitable for braiding and weaving), lb.	55c—45%	45%
		(45c per lb. minimum)
Woven fabrics in the piece	45c + 60%	45c + 60%
If jacquard figured	.	45c + 70%
Pile fabrics, including pile ribbon and articles of ..	45c + 60%	45c + 60% or 65%
Rayon ribbons (except pile) and smallwares ..	45c + 60%	45c + 60%
If jacquard		45c + 70%
Knit goods : ..		
Knit fabrics of rayon, lb	45c + 60%	45c + 60%
Knit goods of rayon, lb.	45c + 60%	45c + 65%
Handkerchiefs and woven mufflers	45c + 60%	45c + 60% or 65%
Clothing and articles of wearing apparel	45c + 60%	45c + 65%
Manufactures of rayon, n s p f.	45c + 60%	45c + 65%

RAISING TURKEYS UNDER COTTON.

Another new use for cotton sheetings has been reported from America, namely, that of raising turkeys under canvas tents or awnings. It is stated that experiments during the past year have proved so successful that important advantages in raising poultry in this way are indicated.

This practice might well be adopted in raising turkeys in some of the rainier districts of Europe.

COTTON BAGGING.

It is reported that Arkansas farmers of Ashley County have made arrangements to use cotton bagging in baling their entire 1930 cotton crop. This will necessitate the use of 180,000 yards of bagging.

U.S. PER CAPITA CONSUMPTION OF COTTON CLOTH.

Per capita consumption of cotton cloth is nearly 20 per cent. greater than it was 30 years ago, according to an analysis of statistics just made by Paul B. Halstead, Secretary of the Cotton Textile Institute.

This analysis of Government and trade statistics indicates that per capita consumption has increased from 57 square yards in 1899 to an average of 68 square yards during the past seven years. It also indicates that the annual volume of cotton cloth consumed in this 30-year period has increased more rapidly than population. While population has increased at an average rate of approximately two per cent. a year during this period the analysis indicates that consumption has increased at an average rate of more than three per cent. annually.

Cloth consumption has shown an upward trend in spite of drastic changes in fashion and fabrics required for wearing apparel. Extensive new markets for cotton goods for other purposes—notably in the manufacture of automobiles, artificial leather, rubberized fabrics and for home decoration have more than offset any decline in per capita consumption of cotton for wearing apparel.

The extent of this change is clearly reflected in a comparison of indicated consumption in each of the three decades. Average annual consumption from 1899 to 1909 was 60 square yards per capita. In the next decade this average increased to 62 square yards. Since 1923 annual per capita consumption has averaged 68 square yards, touching levels in 1923 and 1927 estimated in excess of 70 square yards per capita.

RAW COTTON POOL IN OSAKA.

According to the *Osaka Mainichi*, the formation of a cotton pool is planned by the Gosho Kaisha, the Itochu Shoji Kaisha, the Nippon Menka Kaisha, in order to conduct smoothly the import of raw cotton from America and British India.

This scheme is urged on the cotton importers to avoid competition and to form a cotton-buying pool. The concrete plan for the organization of the cotton pool will be made public after the completion of the readjustment of the Nippon Menka Kaisha.

Hitherto the cotton-spinning companies in Japan have been obliged to buy the material cotton at comparatively high cost, as there was no unification in the system of the cotton import business, despite the fact that raw cotton had been the most important import.

The total import of raw cotton last year was Yen 573,015,000, which compares with Yen 549,042,000 in 1928, Yen 605,274,000 in 1924, and Yen 667,866,000 in 1919. Though all the imports are tending to decline gradually, the import of raw cotton it still taking the first position in the import list of Japan.

As a result of lack of uniformity in the import business system, the cotton importers were compelled to compete with each other in purchasing and were also competing even in sales to the spinners, and these facts are considered to be a direct reason for the poor business result of the cotton importers.

However, the promoters of the cotton pool expect that the proposed pool will check unnecessary rivalry in purchase and selling business, and will improve the business condition of the cotton importers as well as that of the cotton spinners.

THE LIVERPOOL COTTON MARKET.

The Liverpool Cotton Association has decided to extend the market hours from 4 p.m. to 5 p.m. The change has been advocated to provide further facilities for Continental business, which is most active between 4 and 6 p.m.

It is intended that the altered Liverpool hours shall apply over a test period of six months beginning on September 1.

EFFECTS OF INDIAN FOREIGN CLOTH BOYCOTT.

The *Calcutta Commercial Gazette* recently published the following: --

There are unmistakable signs that the movement to boycott foreign cloth has already begun to hit the Indian consumer seriously.

In fact, since propaganda work became intensified, men with a knowledge of the industry, and especially those who watched a like phenomenon in the last Swadeshi days, have apprehended that the first to suffer would be the poorer sections of the consumers and that the profiteer would have the field to himself. As each day passes these fears are shown to be justified.

From inquiries made from those connected with the trade, it is learnt that mill-made Swadeshi cloth has gone up in price and that the supply of khaddar is rapidly diminishing, with the inevitable result that there is no fixed price, and it may not be long before the dealers demand a fantastic price.

A khaddar famine is freely talked of as almost a certainty, and as there is no proper and extensive organization for the production of khaddar it is difficult to understand how fresh supplies can be secured to meet the increasing demand.

Ordinarily a pair of genuine five-yard khaddar *dhotis* sell at about Rs. 4-8, that is, nearly double the price of a pair of ordinary Indian mill-made *dhotis*. It is obvious that it is beyond the means of an average Indian to pay so heavy a premium for the mere self-satisfaction which the wearing of khaddar is supposed to give.

According to a recent issue of *Commerce* (Calcutta), the Bombay Mill Owners' Association contradict the complaints voiced in certain quarters that the price of Indian cotton cloth has been forced up unduly. At the beginning of June, the Association state, mills had large stocks on hand. These have not decreased since then, and are actually higher than they have been for some time. As one reason for this state of things they suggest the continued stoppage of business in piece goods and in other commodities. Hence they express surprise that consumers should have complained about forced-up prices, and that it should have been suggested that the masses of the people would be affected adversely by the present movement toward Swadeshism. It is possible, the report goes on, that retailers are exploiting the present demand for khadi, and that a certain amount of retail profiteering goes on in similar classes of goods. But, on the whole, there is neither evidence that prices have been forced up unduly nor is there the slightest justification for any special increase in prices. The Association further state that in grey khadi mill prices have gone up only half an anna a pound, or less than two pies a yard, in the last three months. Other classes show normal fluctuations, with some increases, some reductions, and many unchanged quotations.

NEW USES OF COTTON.

ROAD SIGNS MADE OF COTTON CLOTH.

Mr. Edward Pickard, chief of the Textile Division, U.S. Department of Commerce, Washington D.C., stated in an interview in Manchester, early this month, that 300 cities in U.S.A. are now using the cotton traffic markers of adhesive tape, as were shown in the spring textile exhibition at Manchester and at the International Committee Meeting at Stresa, in May.

U.S. MERCERIZERS' ASSOCIATION.

An association of mercerizers has recently been formed in the United States in order to standardize their production and identify it as a means of protection for all concerned.

This organization has adopted the name of "durene" for mercerized cotton goods, and includes 85 per cent. of the American mercerizing industry.

Not only is this unique association working to obtain universal recognition for "durene" as a product of definite, unchanging standard of quality upon which manufacturer, jobber, dealer and consumer may depend, but it has embarked upon a programme for popularizing "durene" and has placed at the service of the trade a well organized staff in the interests of better styling and merchandising A display room has been opened at the association's headquarters, 250, Fifth Avenue, New York, where all types of "durene" merchandise may be viewed by merchants and buyers Funds aggregating around half a million dollars have been set aside by the co-operating companies for furthering this work during the current year

Lancashire Egyptian Spinners' Convention.

After a protracted period in which spinners of Egyptian cotton in Lancashire have received unremunerative prices for their yarns, in spite of considerably curtailed production, the Egyptian section have decided that a real effort must be made to put an end to this situation

A committee was formed for the purpose of formulating and submitting a scheme for protecting the interests of Egyptian cotton spinners This Committee, after numerous sittings, has drafted a scheme entitled the Egyptian Spinners' Convention, which it has presented to those concerned

A mass meeting will be held at the end of the month to ascertain the extent of the backing for the scheme Unless the support of 90 per cent of the 20,000,000 Egyptian spindles is obtained the scheme will be dropped

The chief feature of the scheme is a pooling system under which each spinner will be allotted a quota based on the proportion which his spindles bear to the total of all members' spindles

There will be no restriction on the number of hours a spinner may run his mill, but if he runs more than the average spindle hours worked in the trade he will pay into a pool a sum equal to three-fourths of the advantage he would gain by running above the pool line quota

Spinners who run less than the average will draw out of the pool Thus the pool will always balance

Pool settlements will be made monthly

When the trade is running to 95 per cent of full capacity it will be deemed to be working full time and the pool will cease to operate

Minimum marginal rates for the various counts of yarn will be fixed by the Convention, which are to be added to the cost price of cleaned cotton This enables every firm to ascertain the minimum selling price which must be obtained for its own yarn

All that the Convention aims at is that there should be included in the selling price of any class or quality of yarn a marginal figure which represents the minimum amount to cover cost of production on a full time running basis. On this basis the trade will still have to bear the overhead charge costs for the unproductive period for which no demand exists.

Having broadly outlined the main features of the Convention, some of its other advantages may be summarized as follows:—

There is no arbitrary fixing of selling prices. Every spinner regulates his own selling price having regard to the rules and regulations of the Convention.

Every firm whose spindles are entered in the Convention is at full liberty to employ them as best suits its own circumstances.

Trade production will automatically tend to be regulated by the actual state of demand.

Any firm which feels dissatisfied with the working of the Convention is at liberty to retire at the expiration of 12 months without penalty and without loss except its proportionate share of expenses incurred.

One thing more than any other, essential for the successful inauguration and working of the Convention, is the spirit in which the trade accepts it.

The Egyptian section of the spinning industry has a much easier task in controlling its trade than that with which the American section is faced, in the fact that at least two-thirds of the world's spindles on Egyptian yarn are situated in this country.

If the scheme is adopted, the Committee predict that a striking advance will have been made towards consolidating and fortifying the position of Egyptian spinners in England.

U.S. CONSUMPTION.

U.S. domestic consumption of cotton during the month of June, according to the Census Bureau, was 405,000 bales, as against 474,000 in May and 570,000 in June last year. The total consumption so far this season amounts to 5,735,000 bales against 5,552,000 last season.

Exports this season to end of June total 6,514,000, as against 7,812,000 last year. End of June mill stocks were 1,357,000 against 1,531,000 last month and 1,280,000 last year. Warehouse stocks were 3,105,000, against 3,557,000 last month and 1,570,000 last year.

STATE OF TRADE

(The following State of Trade Report arrived too late for insertion in the section dealing with state of trade.)

SWITZERLAND.

The actions of the American and Egyptian Governments in the cotton markets has shaken the confidence of the trade and intensified the holding-up of business, especially as regards cotton manufactures.

In consequence we have to report an increased stoppage of activity in every branch except in a few specialities. The spinning, doubling and weaving sections are working considerable short time, for the most part at a loss; the amount of short time is furthermore increasing. In the quarter under review, one weaving mill has been forced to liquidate, some doubling mills are stopped, others (among which are spinners) are threatened with the same fate unless a radical improvement takes place. Enquiries and orders, in spite of low prices, are very limited, so that in many cases 30 per cent. and higher short time does not benefit the situation.

The following is the original report in German:—

SITUATIONSBERICHT II. QUARTAL 1930, SCHWEIZ.

Die Baumwollstützungsaktionen der amerikanischen und aegyptischen Regierung erschütterten das Vertrauen in den Rohstoff markt vollends und verschärften die Zurückhaltung des Handels gegenüber Baumwollfabrikaten neuerdings.

Es ist denn auch auf der ganzen Linie eine erneute Stockung des Geschäftes zu konstatieren, von der nur einige wenige Spezialfabrikate ausgenommen sind. Spinn, Zwirner und Weber arbeiten grösstenteils mit Verlust bei erheblichen Betriebseinschankungen, die noch ständig zunehmen. Im Berichtsquartal wurde ein Webereibetrieb liquidiert, Zwirnereibetriebe vorübergehend stillgelegt, andern, darunter auch Spinnereien droht dasselbe Schicksal, wenn nicht bald eine gründliche Besserung eintritt. Nachfrage und Orderbestand sind trotz äusserst gedrückter Preise sehr gering, sodass in manchen Fällen dreissigprozentige und höhere Produktionseinschränkungen nicht vor Arbeit auf Lager zu schützen vermögen.

	Import		Export	
	q.	Fr.	q.	Fr.
Baumwollgarne ...	12,874·64	10,766,845	34,719·46	21,775,792
Baumwollgewebe ...	12,327·59	13,985,919	23,395·15	44,952,547
Stickerein	57·31	346,476	8,339·67	29,880,031
Total	25,259·54	25,099,240	66,454·28	96,608,370

COTTON TRADE STATISTICS

ENGLAND.

EXPORTS OF COTTON AND ARTIFICIAL SILK MIXED PIECE GOODS

Country	Total Exports for 5 months ending May, 1930 Sq. yds.		Total Exports for 5 months ending May, 1930 £		Compared + or with Exports for 5 months ending May, 1929 Sq. yds.
Canada	5,180,143	...	360,176	...	+ 84,595
British India .. .	4,546,953	...	136,863	...	2,527,286
Australia	2,363,043	...	177,899	...	43,264
Dutch East Indies ..	1,424,157	...	65,050	...	131,160
Egypt	1,140,322	...	59,596	..	84,053
British West Africa	1,110,587	.	52,712	...	+ 42,480
British South Africa	1,048,610	...	66,654	...	+ 16,616
China (including Hong Kong)	760,139	...	50,657	...	270,331
New Zealand	680,773	...	60,549	...	+ 52,711
Netherlands	579,910	...	40,445	...	+ 18,001
Ceylon	458,290	...	14,697	...	+ 307,031
Argentine Republic	359,944	...	29,286	...	+ 183,195
Venezuela	293,911	...	13,933	...	279,835
Other Countries	6,976,458	...	453,164	...	...
Total All Markets ...	26,923,240	...	1,581,681	...	7,601,221 £558,614

ITALY.

IMPORTS OF COTTON GOODS.

Country of Origin	Raw Cotton	Cotton Waste	Yarns not mercerized	Sewing Thread	Cloths not mercerized	Velvets quintals of lire (00's omitted)
Austria				-	666	-
Belgium			-	185	212	18
Czecho Slovakia ..				—	1,119	141
France		2,512	1,826	3,126	3,033	131
Germany		6,821	272	400	2,158	887
Great Britain ..		4,580	5,887	242	6,166	400
Switzerland ..		1,821	1,855	-	2,193	9
Japan	-	-	—	—	86	—
British India and Colonies ..	480,589	—	—	—	—	—
Egypt	239,763	—	—	—	—	—
Tunis	—	-	—	93	—	—
U.S.A.	1,662,369	22,224	—	—	938	—
Other Countries ..	62,110	12,565	454	78	566	3
Total	2,444,831	50,553	10,294	4,124	17,137	1,589

ITALY—*continued*

EXPORTS OF COTTON GOODS

		Yarns not mercerized	Yarns mercerized	Sewing Thread	Cloths not mercerized	Cloths mercerized	Cloths mixed with silk and art silk	Made up goods quintals of lire (00's omitted)
Albania .. .	-	2,335	-	161	—	—	..	
Austria .. .	333	2,366	86	278				
Belgium .. .	1,118	-						
Bulgaria .	-	21,894	1,211	528				
Czecho-Slovakia	128			-				
Denmark	2,566	- -						
France	19,050	1,039			975	11	-	181
Germany	21,668	13,539	-		2,838	305	13	151
Great Britain	11,343	—			8,467		90	351
Greece ..	—	3,011	463	686	10,797	1,603	118	110
Latvia .. .		-			—	63	-	—
Lithuania .					-	18	-	
Malta		605		101	1,619	-	-	178
Norway ..		--				198	- -	
Holland					985	252	51	
Poland ..	415				—		—	
Serbia .. .	1,362	26,008						
Roumania .	340	38,697						
Russia	—	-			-	--		-
Spain	4,864						35	
Sweden	2,674		-			-	- -	
Switzerland ..	6,356	9,178			1,557	91		177
Turkey	—	9,210	1,305	1,252	38,285	1,901	18	134
Hungary	-	—	-	75	1,489	94	—	35
Cyprus		--	13	-	—	—		
China	-	—	--		4,117	129		
Georgia		-	--		--		9	
British India and Colonies .		7,332	61	-	20,313	739	752	
Dutch East Indies				-	15,842	695	1,375	
Is. It. Egeo ..					1,212		-	
Mesopotamia ..					5,766			
Palestine					1,913			
Syria .. .					—			
Straits Settlements				32	1,007	-		
Turkey (Asiatic) .		6,836	115	506	15,764	1,665	155	10
British S. Africa ..	-		—	- -	8,465		96	551
British — Africa ..	-	—	-	- -	—	—	- -	90
Spanish Africa ..			—	—	-	11	—	-
Egypt	4,147	10,312	170	618	61,321	1,936	1,874	3,159
Eritrea	—	4,504	—	—	18,143	—	- - -	—
Morocco		1,867	277	760	17,893	2,724	1,157	—
Italian Somaliland	-	—	-	-	3,767	—	- -	—
Tripoli and Cirenaica	-	1,927	- -	130	7,262	—	-	439
Tunis		1,877		34	807	370	149	36
Argentine		32,585	317	107	116,134	2,327	41	565
Brazil		147	37		2,628	470		-
Chili		3,798	-	154	18,577	827		
Colombia .. .						185		131
Costa Rica .. .					1,320			
Cuba					953			
Ecuador					1,042			
Mexico					1,219	113		
Panama					86			
Peru					6,070	293	116	
U.S.A.	......				1,080	126	101	
Uruguay . ..		2,123			11,601			
Venezuela	-				3,489		-	
Other Countries ..	7,478	23,499	1,000	1,037	43,932			
Total ..	93,464	227,749	7,229	10,833	539,568	28,512	8,117	10,159

ARTIFICIAL SILK INFORMATION

YARNS AND PIECE GOODS

PRODUCTION—EXPORTS—IMPORTS—TARIFFS
MARKET REPORTS

APPLY:

The TEXTILE & ENGINEERING PRESS BUREAU Ltd.
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EXPORTS OF RAW COTTON FROM THE UNITED STATES BY COUNTRIES.

AUGUST-APRIL, 1928-29 AND 1929-30 (Bales of 500 lbs. gross).

Country to which exported	August-April 1928-29 Bales	 1929-30 Bales
Long and short staple:		
United Kingdom	1,804,429	1,227,350
Germany	1,757,786	1,628,916
France	773,938	818,860
Italy	621,365	634,922
Spain	259,575	253,319
Belgium	187,837	161,674
Soviet Russia in Europe	165,624	81,643
Netherlands	147,119	124,753
Sweden	49,122	47,478
Other Europe	90,967	84,824
Total Europe	5,857,762	5,063,739
Japan	1,220,914	974,139
Canada	222,266	161,235
China	203,892	218,525
British India	9,112	7,591
Other countries	19,855	12,633
Total exports	7,533,801	6,437,862
Total imports*	384,766	325,384
Total re-exports	13,330	9,073
Net exports	7,162,365	6,121,551

* Bales of 478 pounds net.

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EXPORTS OF COTTON FROM PARAHYBA (NORTH BRAZIL) IN 1929.

Shippers in Parahyba	Kilos
Cia Com. Industria Kröncke	4,720,689
Abilio Dantas & Cia	4,401,031
S. A. Wharton Pedrosa	3,494,824
José Limeira & Cia	2,860,640
Nicolau da Costa	1,022,620
Pinto Alves & Cia, Recife	865,283
Lafayette, Lucena & Cia	394,880
Soares de Oliveira & Cia	283,436
Vellozo Borges & Cia	234,358
Araujo Rique & Cia	176,103
José de Britto & Cia	64,599
Agnello Amorim & Cia	58,884
Demosthenes Barbosa & Cia	49,598
Total	19,074,945

Of this quantity 14,698,980 kilos are exported to Europe, as follows:—

Ports	Kilos
Liverpool	12,908,772
Hamburg	426,670
Leixoes (Oporto)	289,206
Rotterdam	1,058,360
Barcelona	15,972
Total	14,698,980

This cotton is of particular interest to European mills.

ESTIMATED PRODUCTION OF RAYON BY COUNTRIES AND PROCESSES.

Supplied by the Textile and Engineering Press Bureau, Ltd., Manchester.

RAYON YARN (Excluding Waste) in Metric Tons. First Quarter, 1930.

Country	Viscose	Acetate	Cupra.	Collodion	Total
Austria	336			..	336
Belgium	1,307	180	-	84	1,571
Brazil	108				108
Britain	4,212	1,276	95	-	5,583
Canada	459	156	---		615
Czecho-Slovakia	521	--	-	-	521
France	3,772	415	87	15	4,289
Germany	4,207	170	1,300	--	5,677
Holland	1,960	--	--	--	1,960
Hungary	—	-	-	69	69
Italy	7,644	180	150	—	7,974
Japan	2,050	—	--	—	2,050
Poland	457	--	---	198	655
Spain	385	—	-	—	385
Sweden	48	---	--	—	48
Switzerland	1,304	29	—	—	1,333
United States	11,490	905	300	869	13,564
Total	40,260	3,311	1,932	1,235	46,738

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ENGLAND.

EXPORTS OF COTTON GOODS (SIX MONTHS ENDED JUNE 30).

	1929 sq. yds.	1930 sq. yds.
Sweden	8,986,200	10,117,400
Norway	8,140,500	8,587,300
Denmark	12,815,600	13,649,200
Germany	25,009,500	22,964,800
Netherlands	36,496,500	23,386,300
Belgium	14,279,100	16,128,000
France	5,398,900	3,974,600
Switzerland	46,842,100	39,481,000
Portugal, Azores and Madeira	7,126,300	7,139,900
Spain and Canaries	7,419,000	4,013,600
Italy	6,428,900	4,821,800
Austria	3,665,600	3,641,700
Greece	18,098,400	13,669,600
Roumania	6,254,100	8,128,600
Turkey	31,672,500	13,070,600
Syria	12,923,700	7,858,000
Egypt	83,713,300	66,539,500
Morocco	29,679,500	17,171,200
Foreign West Africa	24,684,100	21,096,600
Foreign East Africa	8,933,100	6,169,200
Iraq	23,643,200	19,778,000
Persia	10,225,500	5,799,500
Dutch East Indies	69,569,700	37,989,200
Philippine Islands and Guam	5,738,500	3,306,800
Siam	14,994,700	7,138,800
China	87,662,100	31,312,400
Japan	5,746,900	4,616,100
United States of America	17,093,400	13,000,300
Cuba	9,537,200	5,767,900
Mexico	6,985,100	7,760,700
Central America	7,257,100	7,091,200
Colombia	25,203,900	7,669;100
Venezuela	16,781,900	13,601,500
Ecuador	3,708,200	2,267,700
Peru	6,165,900	5,160,500
Chile	18,822,600	18,224,900
Brazil	31,589,600	4,613,800
Uruguay	9,510,300	9,503,000
Bolivia	1,848,200	1,752,500
Argentine Republic	66,393,800	62,055,500
Irish Free State	13,908,700	13,628,100
British West Africa	55,220,300	57,056,900
British South Africa	34,304,200	27,904,700
British East Africa	10,079,700	8,934,300
British India :		
Bombay via Karachi	134,657,000	140,812,500
„ Other ports	151,091,800	109,507,800
„ Total	285,748,800	250,320,300
Madras	52,944,200	46,082,400
Bengal, Assam, Bihar and Orissa	353,151,100	277,160,100
Burmah	35,310,500	23,733,300
Straits Settlements and Malay States	44,747,900	18,767,200
Ceylon	14,013,500	12,058,300
Hong Kong	24,904,700	10,814,800
Australia	77,375,300	73,107,100
New Zealand	14,832,200	14,174,800
Canada	20,198,600	16,679,100
British W. India Islands and Brit. Guiana	6,878,100	9,325,200
Other countries	53,455,100	47,809,500

		1929 sq. yds.	1930 sq. yds.
Grey, unbleached		537,607,300	403,839,400
Bleached		702,021,600	512,635,800
Printed		212,058,100	193,268,300
Dyed in the piece		387,130,900	291,288,600
Manufactured of dyed yarn		65,299,700	53,842,900
Total	Square yards	1,931,117,600	1,487,875,000
	Linear yards	1,981,731,800	1,519,219,600
	Cwts.	3,205,656	2,502,118

EXPORTS OF COTTON YARNS (SIX MONTHS ENDED JUNE 30)

		1929 lbs.	1930 lbs.
Soviet Union (Russia)		175,600	102,800
Sweden		702,600	870,600
Norway		1,585,700	1,846,800
Denmark		735,300	796,700
Poland (including Dantzig)		1,251,900	392,700
Germany		20,630,100	16,501,200
Netherlands		15,920,500	16,244,000
Belgium		3,090,600	3,702,000
France		2,939,600	2,774,800
Switzerland		3,994,900	3,170,900
Italy		783,600	393,500
Austria		721,700	741,300
Czecho-Slovakia		1,622,500	1,242,100
Yugoslavia		916,500	1,079,000
Bulgaria		819,200	426,900
Roumania		2,142,000	2,901,800
Turkey		284,600	112,500
China (including Hong Kong)		1,304,500	1,026,600
United States of America		1,260,200	1,064,200
Brazil		1,713,500	1,087,000
Argentine Republic		1,122,800	886,300
British India :			
Bombay, via Karachi		233,000	248,600
„ Other ports		4,315,100	3,184,500
„ Total		4,548,100	3,433,100
Madras		5,226,100	2,626,000
Bengal, Assam, Bihar and Orissa		1,988,800	1,226,300
Burmah		313,200	298,000
Straits Settlements and Malay States		146,900	57,200
Australia		2,655,900	2,536,100
Canada		811,700	799,700
Other countries		6,197,100	4,348,400
Counts	Up to 40's	38,160,400	35,855,700
	Over 40's up to 80's	35,020,700	26,550,500
	Over 80's up to 120's	10,803,200	8,793,700
	Over 120's	1,612,400	1,491,600
Grey, unbleached		75,917,900	65,113,100
Bleached and dyed		9,687,800	7,578,400
Total		85,605,700	72,691,500

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Reviews on Current Cotton Literature.

“EMPIRE COTTON GROWING CORPORATION,” Millbank House, Millbank, London, S.W.1. Report of the Administrative Council of the Corporation submitted to the ninth annual general meeting on May 20, 1930. The report gives concise accounts summarizing the work that has been carried out by the Corporation during the past year in India, Australia, South Africa, Swaziland, Northern and Southern Rhodesia, Anglo-Egyptian Sudan, Uganda, Tanganyika, Nyasaland, Nigeria, Gold Coast, Sierra Leone, West Indies, Ceylon, Cyprus and Fiji.

“YEAR BOOK OF AGRICULTURE, 1930.” Published by the United States Department of Agriculture, at $1.50. Contains many interesting articles on various aspects of the cotton industry. Such subjects as the methods adopted for combating cotton pests, the production of longer-staple cotton, the causes of frequent fires in cotton gins, are fully described and commented upon.

“REPORT ON AN ENQUIRY INTO WAGES AND HOURS OF LABOUR IN THE COTTON MILL INDUSTRY, 1926,” published by the Labour Office, Government of Bombay; price 10d. The report deals exhaustively with the conditions of labour existing in the Indian cotton industry. Amongst the subjects treated are methods of wage payments; hours of work, intervals, overtime; attendance and absenteeism; bonus and fines; earnings of jobbers, weavers, ring spinners, winders, reelers, slubbing, intermediate and roving frame tenters and mill clerks.

“PICCOLO ANNUARIO STATISTICO ITALIANO, 1930.” Issued by the Associazione Fra Le Societa Italiane per Azione and the Confederazione Generale Fascista Dell'Industria Italiana

“THE CONTINENTAL DIRECTORY OF COTTON SPINNERS AND MANUFACTURERS, 1930-31.” Published by Messrs. John Worrall, Ltd., Oldham; price 16s. net. The seventeenth edition of this useful and comprehensive directory contains numerous improvements and many additional features relative to the textile industries of the respective countries on the Continent. Especially noteworthy is the current list of Russian mills engaged in the textile trade. This list has been brought up to date through reliable and authentic sources, and the information contained therein should prove valuable to those interested in Russian trade. Amongst a mass of commercial facts and figures, which have been added, are particulars relating to consular and customs information, postal information, etc., all of which enhance considerably the utility of the directory.

“COTTON DOUBLING AND TWISTING,” Vols. II and III, by Sam Wakefield; published by C. Nicholls & Co. Ltd., Manchester. Two interesting and highly instructive volumes, likely to be of special assistance both to students of the cotton industry and to those actually engaged in the doubling trade. Amongst the subjects embraced are fly and ring twisting, twiner twisting, clearing and gassing, reeling, preparing and making-up. A feature of the work is the historical side introduced by the author, tracing most of the important processes right from their earliest form to their present state In addition a number of excellent photographs and diagrams are contained in both volumes The price of the above work is 50s for the four volumes, Volume IV of which will be published shortly

" EMPIRE STOCKTAKING," by L St Clare Grodona, published by Simpkin Marshall Ltd, 77, Stationers' Hall Court, London, E C 4, at 10s 6d This is a very excellent and complete review of the British Empire's products both agricultural and industrial The author devotes a chapter to the production of British Colonial cotton, and deals with the possibilities of increased use by the Lancashire cotton industry of cotton grown within the Empire Another chapter is devoted to exports of cotton piece goods to the Colonies This publication, which is to be issued annually, will be of exceptional service to economists and educationalists Business men anxious to open up new, or to extend existing trade relations within the Empire, will find in this volume information of great value

" DAS HOCHVERZUGSSTRECKWERK IN THEORIE UND PRAXIS," by Johann Jacob Tschudi 72 pages, 40 illustrations, published by Theodor Martins Textilverlag, Leipzig, price RM 5 A concise but complete study of the various high-drafting systems in general use in the cotton-spinning industry to-day

" ECONOMIC CONDITIONS IN BELGIUM IN 1929" Report by the Department of Overseas Trade Published by H M Stationery Office, Adastral House, Kingsway, London, W C 2, at 3s 8d post free

" EMPIRE COTTON GROWING REVIEW " for July, published by P S King & Son, Ltd, London, S W 1, at 1s The July issue of this very readable quarterly contains instructive articles on " Cotton Growing in Tanganyika," " American Cotton in India," " Cotton Breeding," etc An article on " Ginning Technique and Cotton Quality," by Horace Spibey, is continued from the April issue This article is referred to in the American section

" L'EGYPTE AGRICOLE," by S Avigdor, published by Goemaere, Brussels An interesting treatise dealing with the agricultural situation in Egypt After describing the present prosperous conditions of the country, the author proceeds to describe the contemplated schemes of the Government, and ends by suggesting some well thought-out ideas for future agricultural and social reforms

" SECOND REPORT OF THE FABRICS CO-ORDINATING RESEARCH COMMITTEE (Department of Scientific and Industrial Research)" Published by H M Stationery Office, price 5s net The first subject to be treated is the fire proofing of fabrics, both industrial and domestic, such as cotton clothing, flannelette, interior furnishings, truck and hold covers, etc A list of the best-known fireproofing agents is given The action of sunlight on cotton is also exhaustively described Other subjects fully dealt with include the determination of waterproofness of " porous " waterproof fabrics, tensile tests, and the deterioration of fabrics by micro-organism

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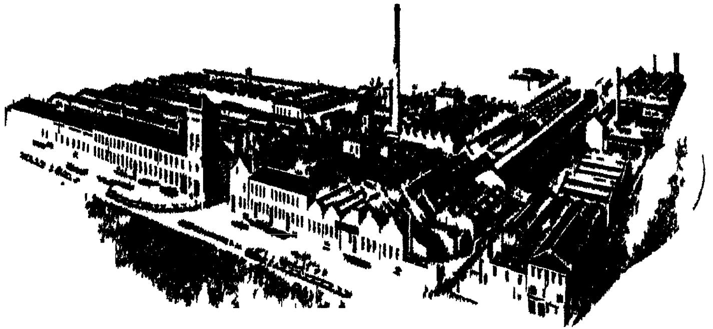

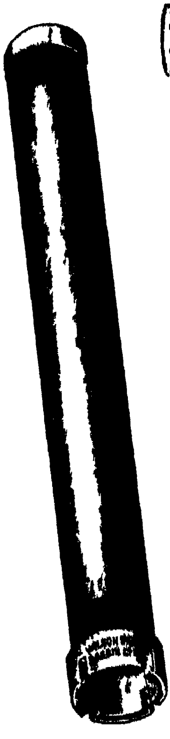

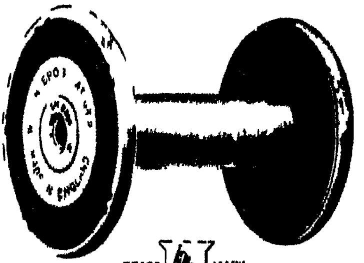

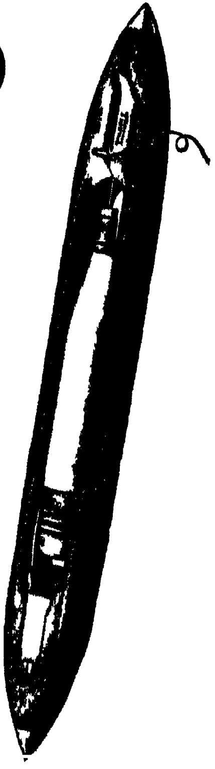

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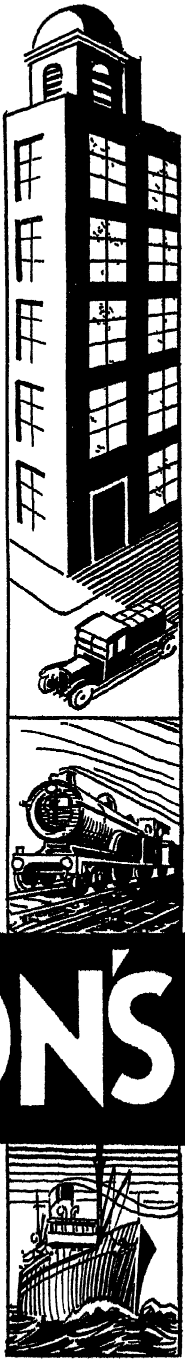

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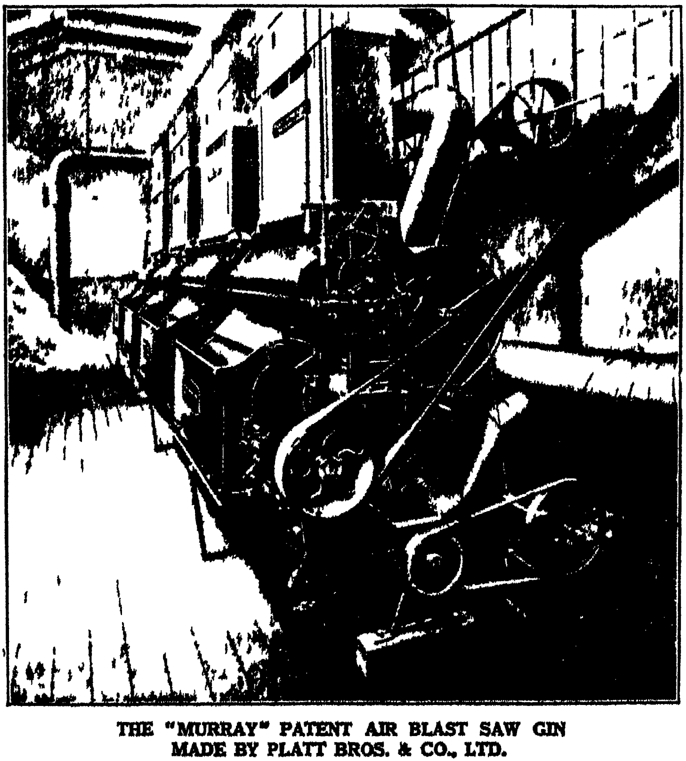

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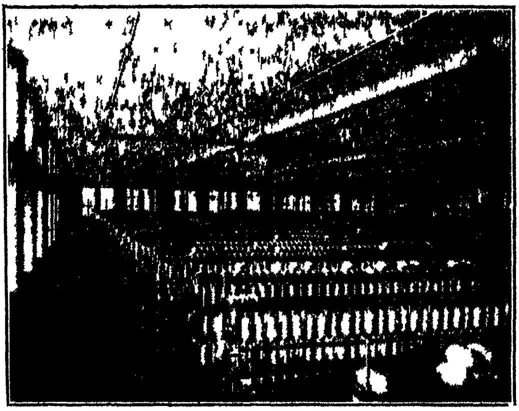

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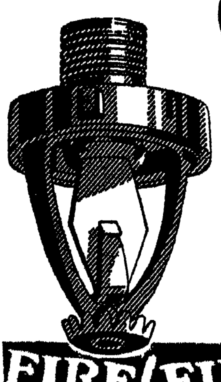

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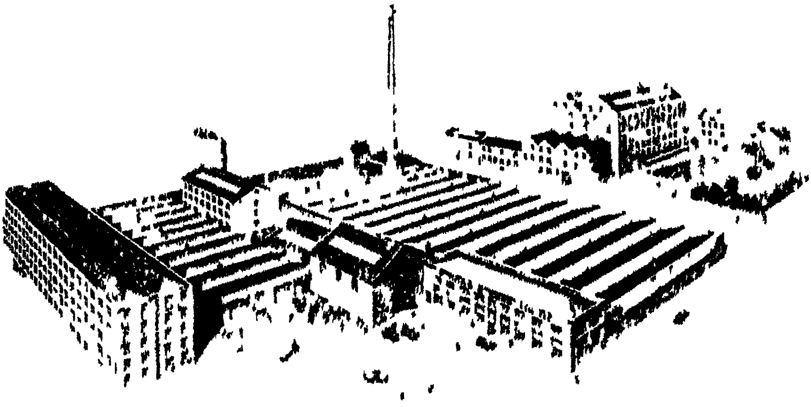

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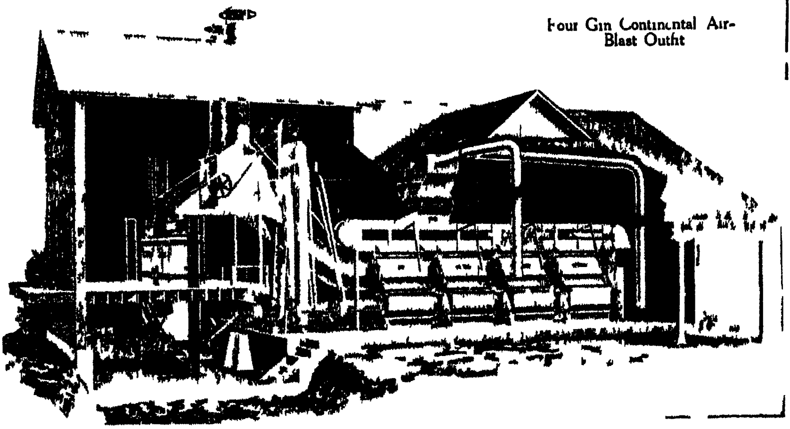

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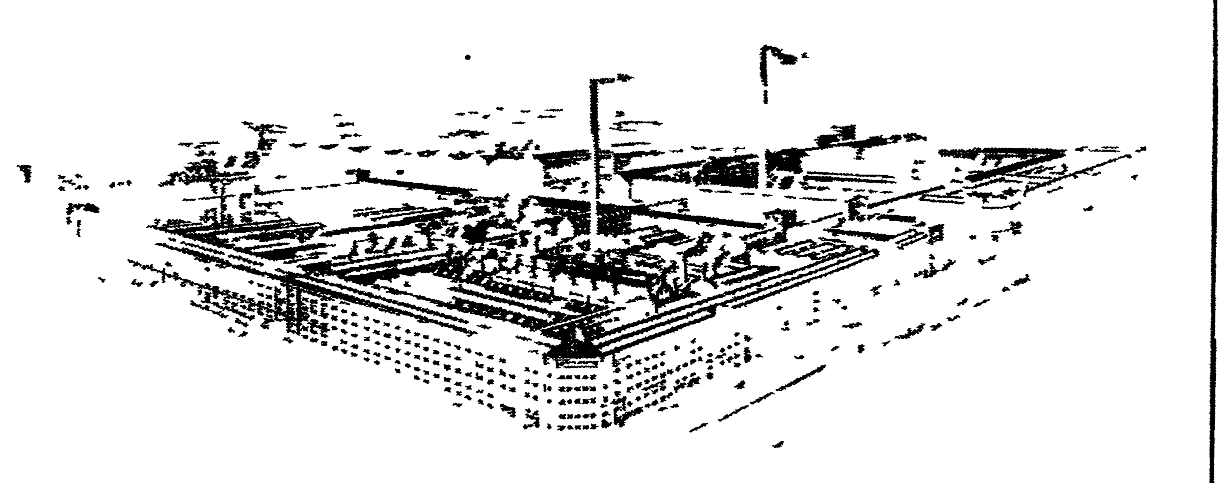

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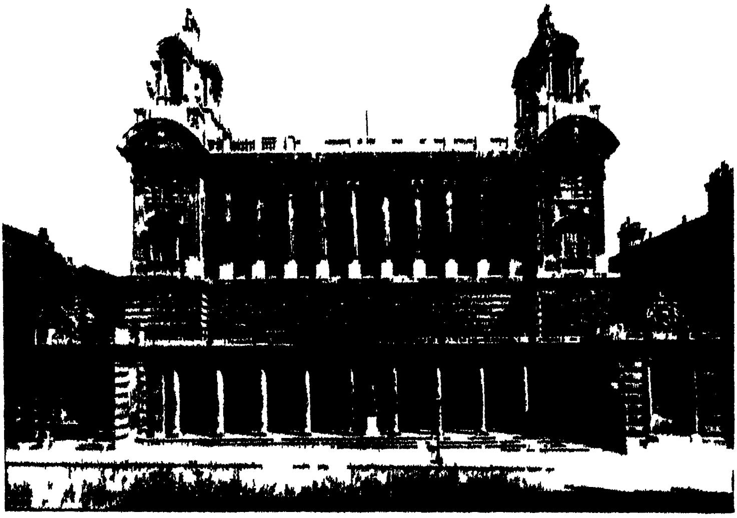

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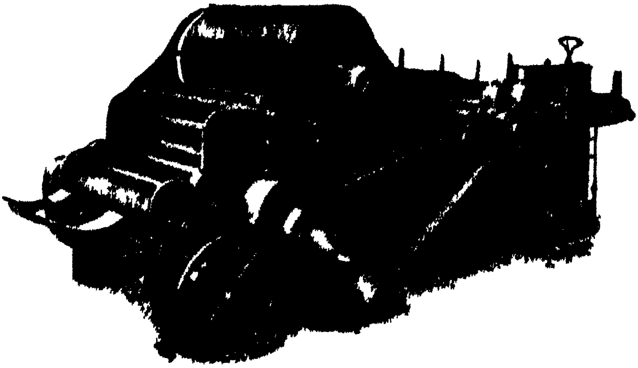

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